

| Index/Name | letzter Kurs | Gesamtertrag inkl. Dividenden (wenn möglich), in EURO | | | | | | |
|--|--|---|------------|------------|------------|------------|------------|---------|
| | | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | |
| AKTIEN | | | | | | | | |
| GLOBAL | | | | | | | | |
| GLOBAL | MSCI All Country World | 862,95 | 7,35% | 27,82% | -12,78% | 18,90% | 26,19% | 2,31% |
| GLOBAL | MSCI World (Developed Markets) | 3.805,33 | 7,04% | 31,39% | -12,52% | 20,47% | 27,46% | 2,37% |
| USA | | | | | | | | |
| USA | S&P 500 Index | 5.954,50 | 8,74% | 38,16% | -12,97% | 22,23% | 33,63% | 0,97% |
| USA | DOW Jones Industrial Average | 43.840,91 | 0,78% | 29,86% | -0,99% | 12,48% | 22,93% | 2,84% |
| USA | Nasdaq 100 Index | 20.884,41 | 36,75% | 36,90% | -28,12% | 50,18% | 34,58% | -0,96% |
| EUROPA | | | | | | | | |
| Europa | MSCI Europe Index | 1.744,86 | -1,46% | 24,50% | -10,96% | 21,97% | 9,83% | 11,37% |
| Europa | STOXX Europe 600 | 557,19 | -1,44% | 25,82% | -9,88% | 16,63% | 9,62% | 10,03% |
| Eurozone | Euro STOXX 50 | 5.463,54 | -2,59% | 24,10% | -8,55% | 23,21% | 11,90% | 11,92% |
| Deutschland | DAX Index | 22.551,43 | 3,55% | 15,79% | -12,35% | 20,31% | 18,85% | 13,27% |
| Frankreich | CAC 40 Index | 8.111,63 | -4,96% | 31,88% | -6,71% | 20,10% | 0,92% | 10,04% |
| Spanien | Ibex 35 Index | 13.347,30 | -12,71% | 10,52% | -2,02% | 28,06% | 20,02% | 15,68% |
| Italien | FTSE MIB Index | 38.655,09 | -3,34% | 26,81% | -9,36% | 34,35% | 18,93% | 13,48% |
| Niederlande | Amsterdam Exchanges Index | 921,92 | 5,53% | 30,48% | -11,44% | 17,18% | 14,59% | 5,25% |
| Belgien | BEL 20 Index | 4.420,51 | -6,61% | 21,86% | -11,47% | 3,51% | 18,46% | 3,73% |
| Griechenland | Athens Stock Exchange | 1.607,79 | -9,33% | 12,44% | 6,62% | 43,09% | 17,64% | 9,45% |
| Schweden | OMX Stockholm 30 Index | 2.724,70 | 11,45% | 30,46% | -20,03% | 21,41% | 4,12% | 12,78% |
| Schweiz | Swiss Market Index SMI | 13.004,48 | 4,32% | 29,77% | -10,19% | 13,86% | 6,14% | 12,46% |
| Vereinigtes Königreich (UK) | FTSE 100 Index | 8.809,74 | -16,27% | 26,04% | -0,64% | 9,97% | 14,92% | 8,43% |
| ASIEN / PAZIFIK | | | | | | | | |
| Japan | TOPIX (Kapitalisierungsgewichtet) | 2.682,09 | 3,34% | 9,79% | -9,43% | 15,52% | 14,89% | 0,66% |
| Japan | NIKKEI 225 (Preisgewichtet) | 37.155,50 | 13,79% | 3,84% | -13,95% | 17,98% | 15,72% | -2,62% |
| China | MSCI China | 72,86 | 19,05% | -15,90% | -16,84% | -13,95% | 27,97% | 12,29% |
| China (Hongkong) | HANG SENG | 22.941,32 | -7,94% | -5,87% | -7,10% | -13,42% | 32,12% | 14,12% |
| SEKTOREN (Entwickelte Märkte im MSCI World) | | | | | | | | |
| Global - Langlebige Konsumgüter | MSCI Global Consumer Discretionary | 456,73 | 25,85% | 26,89% | -28,92% | 31,22% | 30,36% | -2,79% |
| Global - Nicht zyklische Konsumgüter | MSCI Global Consumer Staples | 297,77 | -0,31% | 22,13% | 0,42% | -0,25% | 13,70% | 6,38% |
| Global - Energie | MSCI Global Energy | 254,64 | -36,11% | 52,25% | 56,88% | 0,24% | 10,24% | 4,93% |
| Global - Finanzsektor | MSCI Global Financials | 198,83 | -10,09% | 38,21% | -3,78% | 13,36% | 36,34% | 8,31% |
| Global - Gesundheit | MSCI Global Healthcare | 378,88 | 4,81% | 29,21% | 1,02% | 0,95% | 8,63% | 7,16% |
| Global - Ver. Industrie | MSCI Global Industrials | 421,84 | 3,07% | 25,71% | -7,27% | 19,87% | 21,50% | 3,88% |
| Global - Technologie | MSCI Global Information Technology | 764,93 | 32,50% | 39,73% | -26,23% | 48,76% | 42,30% | -3,75% |
| Global - Grundstoffe | MSCI Global Materials | 339,81 | 10,81% | 25,63% | -4,43% | 11,59% | 1,48% | 5,41% |
| Global - Kommunikation | MSCI Global Communication Services | 131,27 | 13,45% | 23,30% | -32,74% | 41,32% | 43,55% | 2,79% |
| Global - Versorger | MSCI Global Utilities | 170,55 | -2,78% | 19,15% | 2,36% | -1,81% | 22,09% | 4,34% |
| Global - Immobilien | MSCI Global Real Estate | 1.066,66 | -12,05% | 39,08% | -19,73% | 7,41% | 10,08% | 4,73% |
| EMERGING MARKETS | | | | | | | | |
| Global | MSCI Emerging Markets Equity | 1.097,25 | 9,11% | 4,88% | -14,75% | 6,68% | 15,47% | 1,84% |
| Asien ex Japan | MSCI Asia ex Japan | 715,24 | 15,28% | 2,49% | -14,35% | 2,91% | 20,30% | 1,35% |
| Lateinamerika | MSCI Latin America | 1.980,01 | -20,62% | -0,86% | 16,47% | 29,32% | -20,92% | 7,03% |
| Indien | BSE Sensex 30 | 73.198,10 | 4,92% | 29,75% | 1,28% | 15,77% | 13,91% | -8,52% |
| Korea | KOSPI | 2.532,78 | 29,70% | 4,80% | -23,26% | 13,98% | -14,31% | 6,96% |
| Brasilien | Brazil Bovespa Index | 122.799,09 | -27,09% | -11,05% | 16,66% | 28,38% | -24,94% | 7,13% |
| Mexiko | Mexico Bolsa Index | 52.325,73 | -10,31% | 29,85% | 5,14% | 36,37% | -22,78% | 6,90% |
| Ost-Europa | MSCI Eastern Europe | 50,15 | -18,50% | 27,39% | -80,91% | 43,93% | 5,92% | 18,80% |
| Polen | WSE WIG Index | 91.996,40 | -8,33% | 21,17% | -18,67% | 47,04% | 3,05% | 18,76% |
| Tschechien | Prague Stock Exchange Index | 1.975,77 | -7,90% | 53,30% | -6,01% | 25,40% | 31,28% | 12,74% |
| Ungarn | Budapest Stock Exchange Index | 87.146,64 | -17,33% | 19,43% | -20,10% | 44,24% | 21,66% | 12,66% |
| Türkei | ISE National 100 Index | 9.658,72 | -3,53% | -21,16% | 131,09% | -14,37% | 20,86% | -5,25% |
| REITS | | | | | | | | |
| Global | EPRA/NAREIT Global | 2.189,69 | -15,76% | 36,84% | -19,46% | 7,08% | 8,77% | 3,63% |
| ROHSTOFFE | | | | | | | | |
| | | letzter Kurs | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
| Gold | USD/Unze | 2.857,83 | 14,92% | 3,46% | 6,00% | 9,49% | 36,01% | 8,39% |
| Silber | USD/Unze | 31,15 | 35,84% | -5,21% | 9,25% | -3,83% | 29,85% | 7,28% |
| Öl | Brent Öl, USD pro Barrel | 73,18 | -27,91% | 61,22% | 17,41% | -13,19% | 3,58% | -2,41% |
| WÄHRUNGEN | | | | | | | | |
| | | letzter Kurs | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
| US-Dollar | EUR/USD | 1,04 | 8,95% | -6,93% | -5,85% | 3,12% | -6,21% | 0,20% |
| Britisches Pfund | GBP/EUR | 1,21 | -5,41% | 6,33% | -5,03% | 2,12% | 4,77% | 0,32% |
| Schweizer Franken | EUR/CHF | 0,94 | -0,40% | -4,04% | -4,62% | -6,13% | 1,21% | -0,32% |
| Japanischer Yen | EUR/JPY | 156,27 | 3,62% | 3,74% | 7,27% | 10,90% | 4,53% | -4,00% |
| Polnischer Zloty | EUR/PLN | 4,19 | 7,20% | 0,58% | 2,14% | -7,30% | -1,47% | -2,00% |
| Russischer Rubel | EUR/RUB | 93,05 | 30,33% | -5,70% | -7,31% | 26,49% | 15,43% | -19,57% |
| Türkische Lira | EUR/TRY | 37,83 | 36,12% | 66,10% | 32,50% | 62,85% | 12,59% | 3,24% |
| ANLEIHEN (Indizes) | | | | | | | | |
| | | letzter Kurs | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
| Global Rentenmarkt, Staaten & Unternehmen | Bloomberg Multiverse Index | 248,04 | 0,02% | 2,74% | -10,51% | 2,46% | 5,25% | 1,58% |
| Global Staatsanleihen | Bloomberg Global Aggregate Government | 173,17 | 0,62% | 1,33% | -11,33% | 0,82% | 3,33% | 1,34% |
| Euroraum Staatsanleihen | Bloomberg Euro Aggregate Treasury | 247,12 | 4,99% | -3,46% | -18,46% | 7,13% | 1,88% | 0,49% |
| Euroraum Unternehmensanleihen (IG) | Bloomberg Euro Aggregate Corporates | 260,65 | 2,77% | -0,97% | -13,65% | 8,19% | 4,74% | 1,04% |
| Europa | Barclays Eurozone Rentenindex | 226,64 | 4,99% | -3,46% | -18,46% | 7,13% | 1,88% | 0,49% |
| Deutschland | Barclays Deutschland Rentenindex | 206,27 | 3,02% | -2,69% | -17,82% | 5,56% | 0,59% | 0,05% |
| USA Unternehmen (IG) | Citigroup BIG (Broad Investment Grade) | 1.849,77 | -1,04% | 5,65% | -7,81% | 2,25% | 8,27% | 2,29% |
| USA Unternehmen (HY) | Citigroup High Yield | 1.390,66 | -2,37% | 13,16% | -5,39% | 9,92% | 15,99% | 1,61% |
| Japan | Barclays Japan Rentenindex | 211,97 | -0,84% | -0,18% | -5,44% | 0,49% | -3,15% | -1,43% |
| Emerging Markets USD/EUR/GBP | Bloomberg EM Hard Currency Aggregate | 381,06 | -1,74% | 4,83% | -11,14% | 5,92% | 12,87% | 2,12% |
| STAATSANLEIHEN (Rendite) | | | | | | | | |
| | USA | Euroraum | UK | Japan | | | | |
| 2 Jahre Anleihe-Rendite | 3,99 | 2,03 | 4,17 | 0,81 | | | | |
| 5 Jahre Anleihe-Rendite | 4,02 | 2,15 | 4,17 | 1,01 | | | | |
| 10 Jahre Anleihe-Rendite | 4,21 | 2,41 | 4,48 | 1,38 | | | | |
| LEITZINSEN | | | | | | | | |
| | | 28.02.2025 | 30.11.2024 | 31.08.2024 | 29.02.2024 | 28.02.2023 | 28.02.2022 | |
| USA | Fed Funds | 4,50 | 4,75 | 5,50 | 5,50 | 4,75 | 0,25 | |
| Eurozone | Refi-Satz | 2,90 | 3,40 | 4,25 | 4,50 | 3,00 | 0,00 | |
| Japan | Overnight Call Rate | 0,48 | 0,23 | 0,23 | -0,01 | -0,01 | -0,01 | |
| China | Einlagezins 1 J | 1,50 | 1,50 | 1,50 | 1,50 | 1,50 | 1,50 | |

höchste Entwicklung
neutrale Entwicklung
schwächste Entwicklung

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