

## Survey: The future of actively-managed funds

**Active versus passive – this question is often raised, and is often a topic of heated debate. The sustained success of ETFs underscores investor confidence in index-linked funds. However, active fund managers are indeed able to please investors with additional returns. This is demonstrated by the exclusive survey conducted by fondstrends.ch.**

*Kaspar Grob, CEO and Senior Partner, Helvetic Trust AG, Zurich:*

### **Outperformance can be achieved only with an individual investment style**

«The strength of ETFs lies in their coverage of well-known indices. However, ETFs cannot replicate an investment process which reflects the particular investment style of an individual asset manager. This is the only way to secure an outperformance. Over the past 10 years, our trend allocation has enabled us to beat the benchmark consistently, even after all costs are deducted. There cannot be a better argument for active management. Some twelve months ago, this success led us to set up a corresponding “Alpha Dynamic Trend Allocation Fund”. Its performance has maintained our impressive track record of recent years, and has continued to outperform the benchmark.»



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