

Die Goldene Balance

Data Driven, Non-Predictive, Resilient

Company and program overview

December 2025



Company overview

Finbou AG is a Swiss investment advisor, established in 2014, specializing in alternative investments with a strong focus on algorithmic trading across multiple asset classes. Our expertise lies in the in-house development of proprietary trading strategies, supported by rigorous risk assessment and complemented by the sourcing of outstanding investment managers. This combination enables us to deliver institutional-grade investment solutions tailored to the needs of a select group of clients.

Team

- Gianluca Carolo - Investment Advisor & Partner
- Bernhard Stremayr - Risk Manager & Partner

Total AuM: ~\$20 million



Currency – Systematic Strategy
Best Performing Fund in 2023 and over 2 and 3 Years
Finbou Thales
(Finbou AG)



Strategy overview

"Die Goldene Balance" (DGB) combines equities, gold, and bonds within a slightly leveraged framework. The strategy follows a disciplined buy-and-hold approach, validated through extensive long-term backtesting and statistical analysis. The data-driven approach avoids predictions and speculation, relying instead on systematic asset allocation, while diversification helps to mitigate volatility despite the use of leverage. The product is accessible as a collateralized German certificate via different banks and brokers.

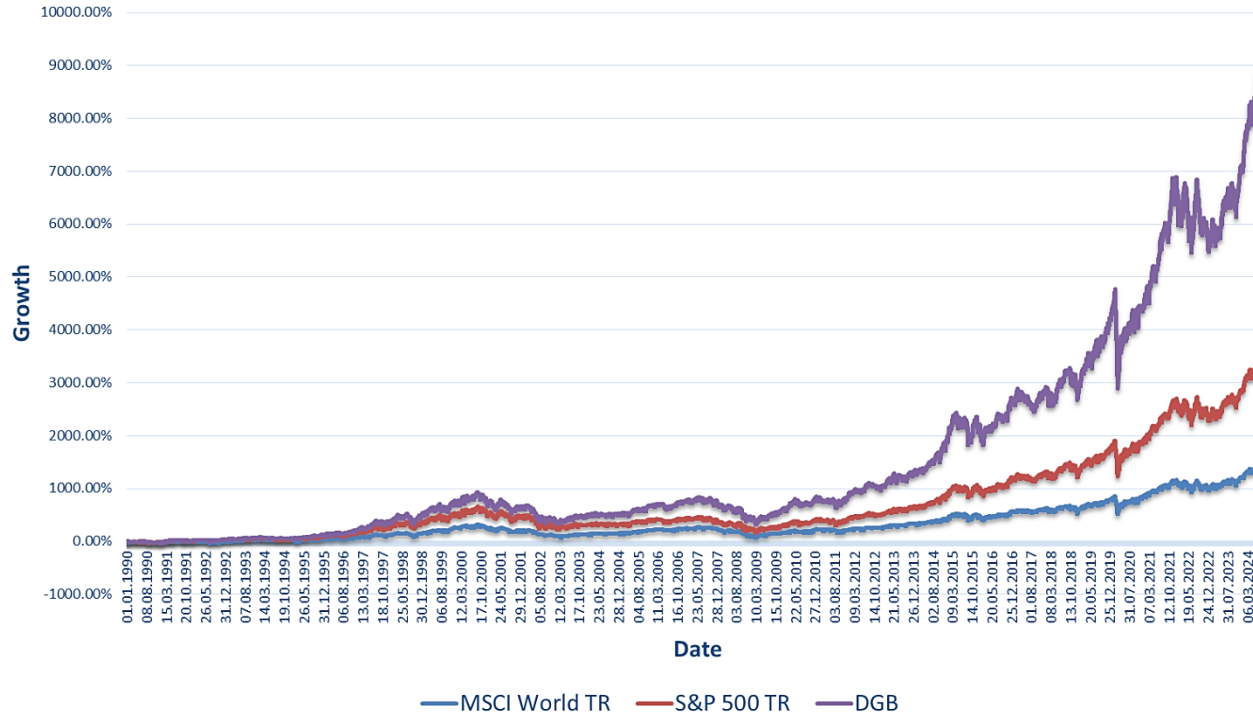
CAGR:	13.84%*
Maximum drawdown:	-58.33%*
Sortino ratio:	0.81*
Sharpe ratio:	0.58*
Trade duration:	Buy and hold (rebalancings)
Investment universe:	ETPs (ETFs, ETCs)
Investment options:	Secured certificate
Date of inception:	04.08.2025
Return since inception:	39.40%

Live tracking of certificate (ISIN) at wikifolio.com: **DE000LS9VCP5**

Listing of ISIN on Euwax: **DE000LS9VCP5**

*** The stats refer to the 35-year simulation shown on the following page.**

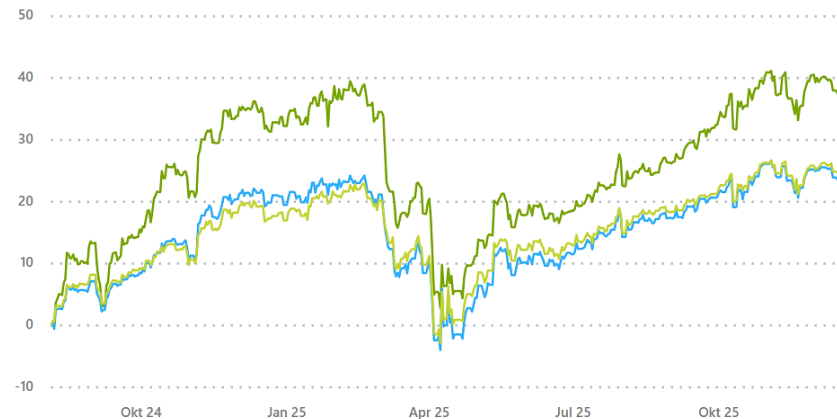
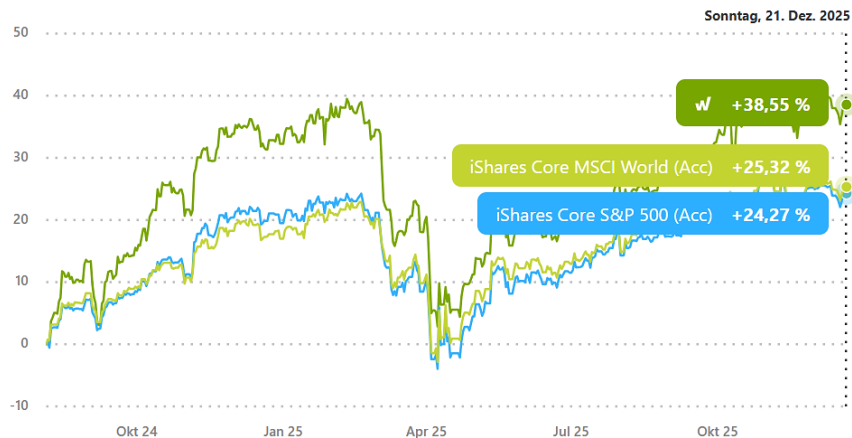
DGB 35-year backtest*



	CAGR	Maximum Drawdown	Sortino Ratio
DGB	13.84%	-58.33%	0.81
S&P 500 TR	10.82%	-63.91%	0.65
MSCI World TR	8.20%	-55.93%	0.42

* TERs of ETFs and ETCs are included in the simulation.

DGB vs index ETFs live results*



+39,4 %

seit 05.08.2024

+27,3 %

Ø-Perf. pro Jahr

+5,7 %

Performance (1 J)

25,3 %

Volatilität (1 J) ⓘ

1,1

Rendite/Risiko ⓘ

* The stats are net of 5% performance fee and 0.95% management fee.

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