

# Die Goldene Balance

*Resilient Allocation, Enhanced Returns.*

**Company and program overview**

September 2025



# Company overview

Finbou AG is a Swiss investment advisor, established in 2014, specializing in alternative investments with a strong emphasis on algorithmic trading across multiple asset classes. At the core of our expertise is the in-house development of proprietary trading strategies, complemented by the sourcing of outstanding investment managers and rigorous risk assessment. 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 is built on a disciplined buy-and-hold approach, validated through extensive long-term backtesting and statistical analysis. By avoiding predictions and speculation, the portfolio relies on evidence-based allocation, while diversification mitigates volatility even in the presence of leverage. DGB is accessible as a wikifolio certificate under a German ISIN.

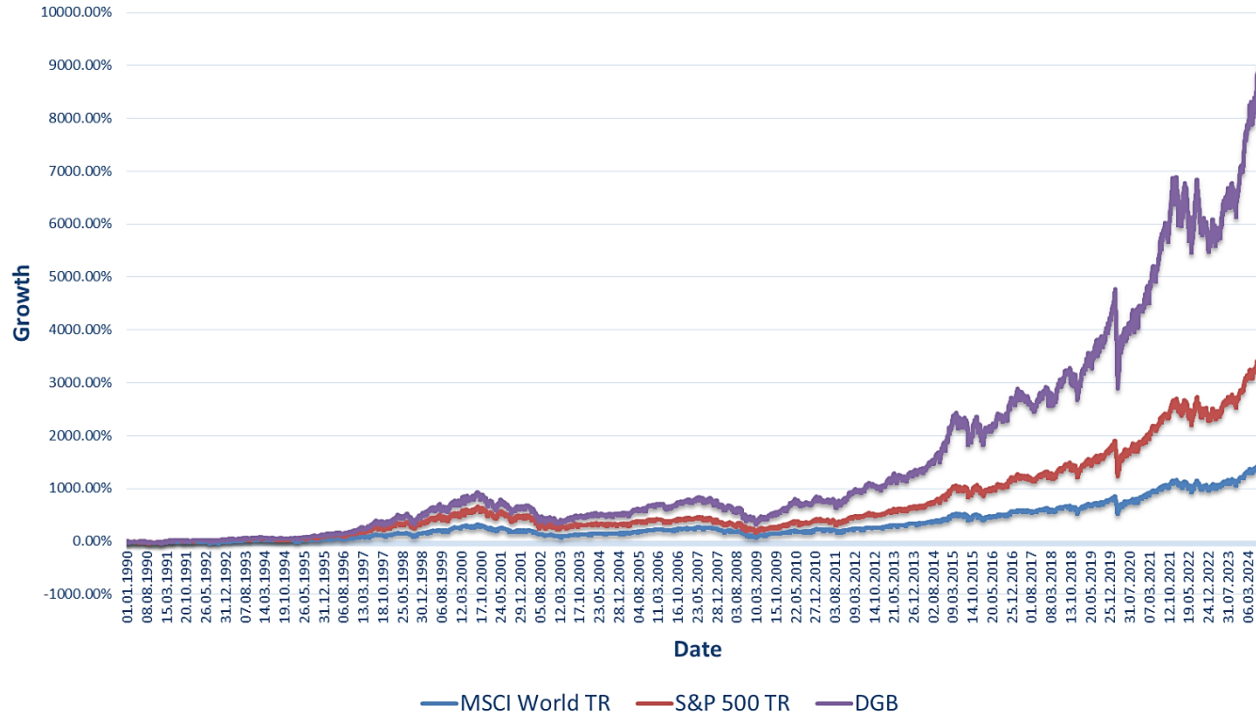
<b>CAGR:</b>	<b>13.84%*</b>
<b>Maximum drawdown:</b>	<b>-58.33%*</b>
<b>Sortino ratio:</b>	<b>0.81*</b>
<b>Sharpe ratio:</b>	<b>0.58*</b>
<b>Trade duration:</b>	<b>Buy and hold (rebalancings)</b>
<b>Investment universe:</b>	<b>ETPs (ETFs, ETCs)</b>
<b>Investment options:</b>	<b>Secured certificate</b>
<b>Inception:</b>	<b>04.08.2025</b>
<b>Return since inception:</b>	<b>27.3%</b>

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.**

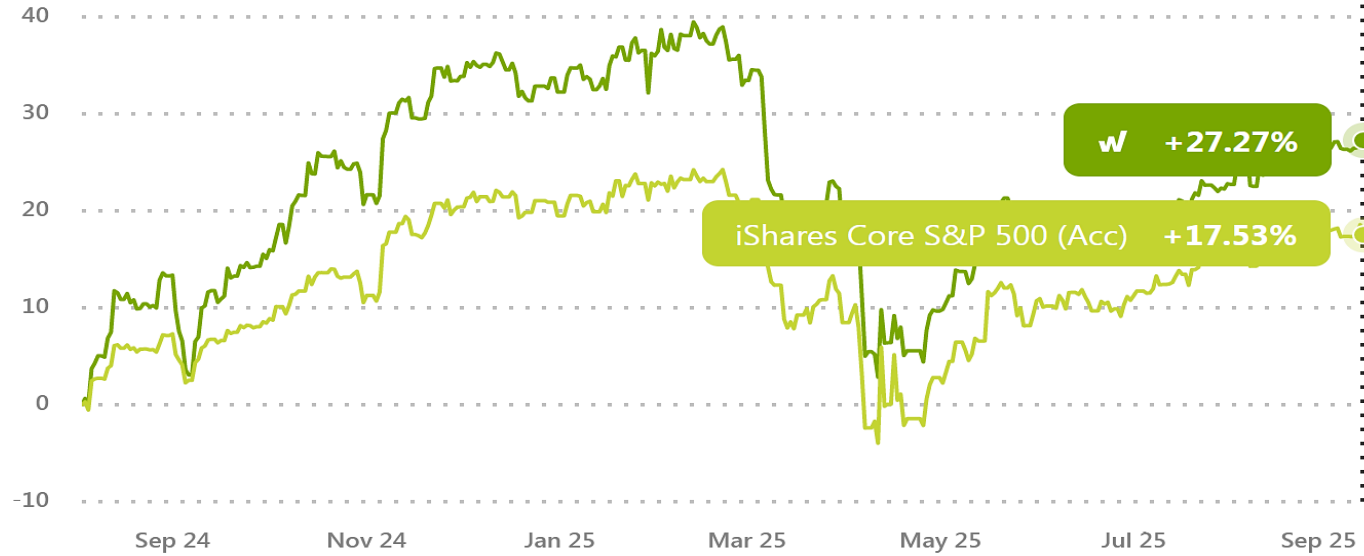
# DGB 35-year backtest\*



	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 S&P 500 live results\*



**+27.3%**

since 8/5/2024

**+24.8%**

Ø-Perf. per year

**+18.1%**

Performance (1yr)

**25.8%**

Volatility (1yr) 

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

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