

Lazard Patrimoine Opportunities SRI PC EUR

Categoria Morningstar™

Bilanciati Moderati EUR

Benchmark Morningstar

Morningstar Euro Moderate Target

Allocation NR EUR

Usato nel Report

Benchmark Dichiarato

50% MSCI ACWI NR EUR, 50% ICE BofA EUR

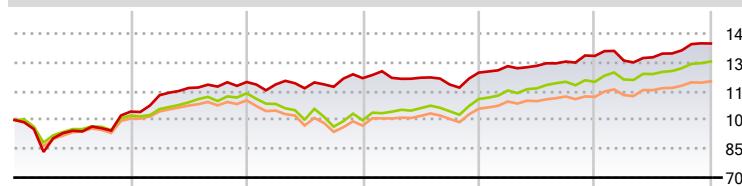
Brd Mkt TR EUR

Morningstar Rating™

★★★

Obiettivo d'Investimento Dichiarato

Through a dynamic allocation, Lazard Patrimoine Opportunities SRI aims to outperform the composite benchmark index net of fees, over a recommended investment period of five years. Applying a socially responsible approach, our investment strategy is based on a short and medium term fundamental analysis of the economic cycle in order to build a dynamic allocation (20%-80% equities, -5%;+10 interest rate sensitivity) to adapt to changing market conditions.

Rendimenti


	2020	2021	2022	2023	2024	2025-12
Fondo	4,36	14,77	1,66	2,38	6,96	4,85
Benchmark e Indici	2,32	11,32	-12,38	11,10	8,07	8,84
Categoria			0,91	9,36	-11,66	9,10
				5,81		7,27