

# Eurizon Next - Strategia Conservativa G Dis

## Categoria Morningstar™

Bilanciati Prudenti EUR - Globali

## Benchmark Morningstar

Morningstar Euro Cautious Global Target

Allocation NR EUR

Usato nel Report

## Benchmark Dichiarato

N/A

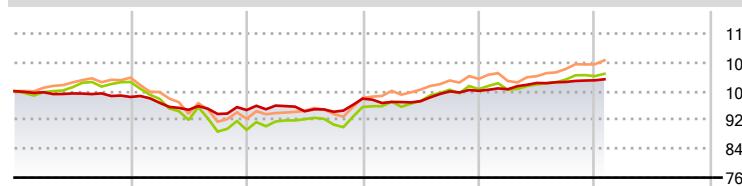
## Morningstar Rating™

★★

### Obiettivo d'Investimento Dichiarato

To moderately increase the value of your investment over time. The fund is actively managed and with no reference to a benchmark. The fund mainly invests in government and corporate bonds and, to a lesser extent, in equities. These investments may be from anywhere in the world, including emerging markets. Bond investments are denominated in any currency and some may be below investment grade. The fund may invest significantly in Italian government bonds with any credit rating. The fund generally favours direct investment but may at times invest mainly through funds and derivatives.

### Rendimenti



2021 -1,61 2022 -3,69 2023 3,35 2024 2,21 2025 2,90 2026-01 0,29

2,55 -12,96 7,12 5,19 3,58 0,62

3,85 -10,93 6,34 5,50 4,02 1,03

### Misure di Rischio

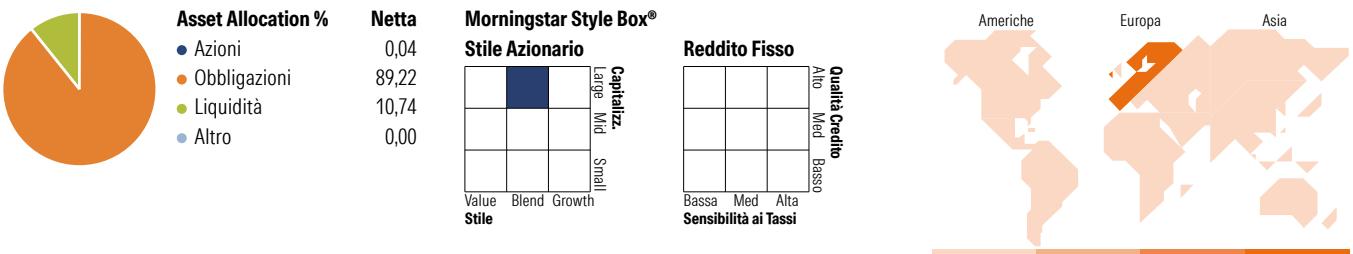
3Y Alpha	-1,18	3Y Sharpe Ratio	-0,20
3Y Beta	0,43	3Y Std Dev	2,31
3Y R-Squared	51,69	3Y Risk	Basso
3Y Info Ratio	-0,79	5Y Risk	Basso
3Y Tracking Error	2,74	10Y Risk	-

Basati su Morningstar Euro Cautious Global Target Allocation NR EUR (dove applicabile)

Rend. Cumulati %	Fondo	Bmk	Cat	Rendimenti Trimestrali %	Q1	Q2	Q3	Q4
3-Mesi	0,51	1,01	1,89	2026	-	-	-	-
6-Mesi	0,98	2,92	4,27	2025	0,43	1,74	0,26	0,45
1-Anno	2,74	3,26	3,93	2024	-0,94	0,22	2,79	0,16
3-Anni Ann.ti	2,52	4,90	5,35	2023	1,31	-1,64	-0,15	3,88
5-Anni Ann.ti	0,68	1,01	1,80	2022	-1,65	-2,00	-1,23	1,17
10-Anni Ann.ti	-	-	-	Rendimenti aggiornati al 10/02/2026	-	-	-	-

### Portafoglio 30/11/2025

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Patrimonio Netto (Mln)

391,09 EUR

(30/11/2025)