

German Fund Champions 2023

Methodology Description

Introduction

The German Fund Champions Award aims to evaluate the management quality of Fund Companies / Asset Managers in the most relevant asset classes for private investors. To ensure a fair comparison of product providers, only established companies with a comprehensive product range as well as an adequate amount of managed assets are considered.

Prizes are awarded to the “Champions” in following categories

- Equity funds (active management),
- Bond funds (active management),
- Balanced funds,
- ESG funds,
- ETF equity,
- ETF bonds,
- Strategy funds (liquid alternatives),
- Thematic funds.

A two-step assessment approach is used to determine the leading companies in each category.

Step 1 - Qualification

Respectively 20 companies are preselected for the Equity, Bond, Balanced & ESG fund categories, 10 companies are pre-selected in the remaining categories.

Qualification criteria:

- Market size: Total net assets of rated funds (f-fex fund rating) in the specific category
- Market role: level of awareness for individual investors (evaluation of PI's on major financial information platform in Germany [finanzen.net](https://www.finanzen.net))
- Market coverage: at least 20% of all sub-categories (“Peergroup”) must be covered

Step 2 - Assessment

Evaluation criteria: volume weighted average of the f-fex fund rating of a company's rated funds, including those from subsidiaries and affiliate companies. For the ETF categories, the fund's costs are also evaluated and enter in the overall grade (Ratio 30/70).

In each category, the top three companies are awarded as “Champion”.

f-fex fund rating

The f-fex fund rating evaluates the quality of mutual funds in accordance with clearly defined, qualitative and quantitative criterias, enabling a fair and meaningful comparison of funds with similar investment strategies („Peergroups“).

The complete rating methodology can be downloaded here: [RATING METHODIK \(f-fex.de\)](https://www.f-fex.de/de/produkte/ratings/f-fex-fondsratings)

The actual f-fex fund ratings can be found here: <https://www.f-fex.de/de/produkte/ratings/f-fex-fondsratings>

Contact

f-fex AG
Dornbachstr. 1a
61352 Bad Homburg v. d. H.

Phone +49 (0)6172 2655-370
Fax +49 (0)6172 2655-373
E-Mail: info@f-fex.de