

Portefeuille Rochon US (en devise américaine) :

Ceci est un portefeuille réel. Il regroupe des comptes familiaux gérés par François Rochon. Il sert de modèle pour la gestion privée à Giverny Capital (pour les mandats US).

| Année | Rochon US | S&P 500 | +/- |
|------------------|----------------|----------------|----------------|
| 1993 (Q3-Q4) | 32.7% | 5.0% | 27.7% |
| 1994 | 9.9% | 1.3% | 8.6% |
| 1995 | 54.8% | 37.6% | 17.2% |
| 1996 | 27.0% | 23.0% | 4.1% |
| 1997 | 32.9% | 33.4% | -0.4% |
| 1998 | 11.0% | 28.6% | -17.6% |
| 1999 | 15.9% | 21.0% | -5.1% |
| 2000 | 11.3% | -9.1% | 19.5% |
| 2001 | 8.1% | -11.9% | 20.0% |
| 2002 | -4.4% | -22.1% | 17.7% |
| 2003 | 31.6% | 28.7% | 2.9% |
| 2004 | 9.3% | 10.9% | -1.6% |
| 2005 | 12.5% | 4.9% | 7.5% |
| 2006 | 3.3% | 15.8% | -12.4% |
| 2007 | -1.7% | 5.5% | -7.2% |
| 2008 | -24.3% | -37.0% | 12.7% |
| 2009 | 28.7% | 26.5% | 2.3% |
| 2010 | 21.9% | 15.1% | 6.8% |
| 2011 | 4.9% | 2.1% | 2.8% |
| 2012 | 22.8% | 16.0% | 6.8% |
| 2013 | 40.6% | 32.4% | 8.2% |
| 2014 | 18.0% | 13.7% | 4.3% |
| 2015 | 1.7% | 1.4% | 0.4% |
| 2016 | 7.5% | 12.0% | -4.5% |
| 2017 | 19.7% | 21.8% | -2.1% |
| 2018 | -8.3% | -4.4% | -3.9% |
| 2019 | 32.1% | 31.5% | 0.6% |
| 2020 | 16.0% | 18.4% | -2.4% |
| 2021 | 27.9% | 28.7% | -0.8% |
| Total | 5438.1% | 1745.6% | 3692.5% |
| Annualisé | 15.1% | 10.8% | 4.4% |

Portefeuille familial privé géré par François Rochon antérieur à l'inscription de Giverny Capital

Inscription à l'AMF en 2000

Au 31 décembre 2021

