UP 60 Index

Factsheet
31/10/2026

Strategy description

Strategy aiming to follow the Pictet LPP 60 2000 benchmark using passive funds managed by UBS Asset Management. This strategy's risk profile is "high risk", consisting of a very high allocation to equities, resulting in a very high investment risk.

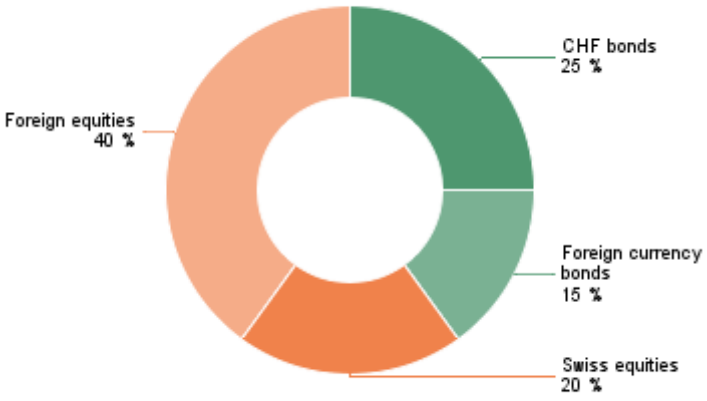
Historical Returns



Risk profile



Strategic Asset Allocation



Yearly returns

	YTD	2025	2024	2023	2022	2021
UP 60 Index	8.58%	6.52%	13.80%	7.64%	-15.86%	11.83%
Pictet LPP 2000 60 TR	8.98%	6.29%	13.76%	7.68%	-15.69%	11.99%

Annualized Performance over Last 5 Years

	1 Month	YTD	1 Year	3 Years	5 Years
UP 60 Index	-0.06%	8.58%	9.53%	11.31%	3.86%
Pictet LPP 2000 60 TR	0.02%	8.98%	10.05%	11.38%	3.96%

Key Information

Foreign currency exposure	55.00%
Proportion of active investments	0.00%
Rebalancing	Weekly (according to the schedule set by the foundation)
Benchmark	Pictet LPP 2000 60 TR
Total expense	0.36%

Key Risk-Return Statistics 5 Years

	Strategy	Benchmark
Standard Deviation	8.13%	8.17%
Sharpe Ratio	0.48	0.49
Max Drawdown	-17.52%	-17.44%
Tracking Error	0.53%	

Legend: Performance is calculated on a monthly basis using a time-weighted return (TWR) applied to the investment portfolio, excluding operational cash. Returns are shown net of third-party management fees and custody charges. Foreign currency exposure is reported after taking hedging transactions into account. The ESG allocation reflects the share of investments in ESG-labelled funds, as defined by the respective fund managers.

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