

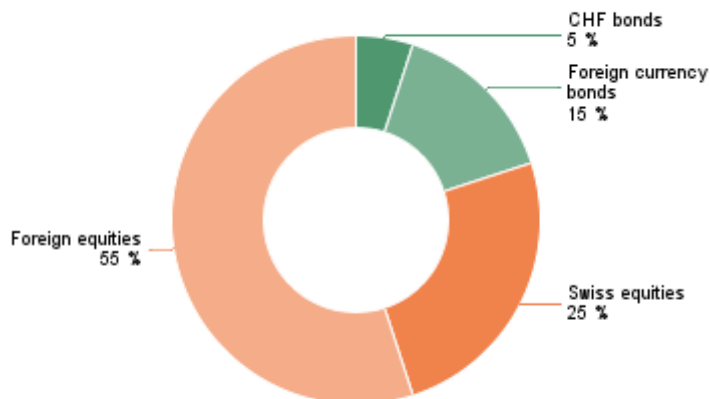
Strategy description

Strategy that aligns with the spirit of the Pictet LPP 2000 indices 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.

Risk profile



Strategic Asset Allocation



Historical Returns



Yearly returns

	YTD	2025	2024	2023	2022	2021
UP 80 Index	10.01%	8.49%	16.93%	7.94%	-16.75%	16.94%
Pictet LPP 2000 60 TR CHF	7.67%	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 80 Index	2.97%	10.01%	19.47%	11.80%	5.26%
Pictet LPP 2000 60 TR CHF	2.35%	7.67%	14.62%	9.52%	3.86%

Key Information

Foreign currency exposure	70.00%
Proportion of active investments	0.00%
Rebalancing	Weekly (according to the schedule set by the foundation)
Benchmark	Pictet LPP 2000 60 TR CHF
Total expense	0.35%

Key Risk-Return Statistics 5 Years

	Strategy	Benchmark
Standard Deviation	10.25%	8.30%
Sharpe Ratio	0.54	0.48
Max Drawdown	-19.11%	-17.44%
Tracking Error	2.23%	

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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