UP 60 Global

Factsheet
31/10/2026

Strategy description

The strategy, incepted by Vested Benefits UP, invests in bonds, equities and real estate with a focus on diversification. The investment funds making up the strategy are managed by various best-in-class managers. The investment funds are managed passively or actively, depending on asset class. This strategy's risk profile is "high risk", consisting of a very high allocation to equities, resulting in a very high investment risk.

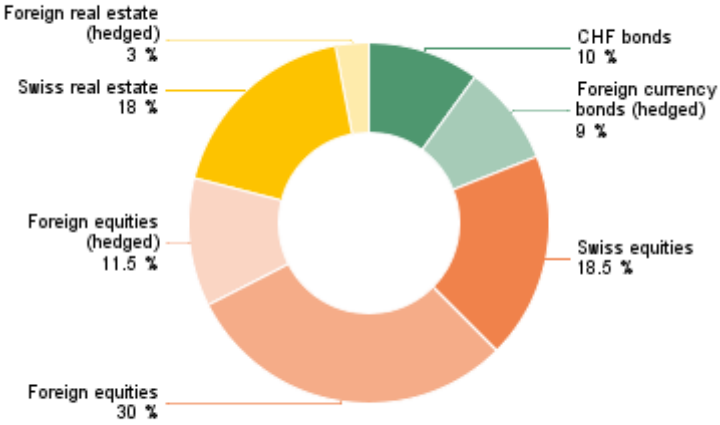
Historical Returns



Risk profile



Strategic Asset Allocation



Yearly returns

	YTD	2025	2024	2023	2022	2021
UP 60 Global	7.28%	8.00%	12.69%	7.05%	-15.64%	13.76%
Pictet LPP 2005 60 Plus TR	6.38%	4.20%	12.85%	8.24%	-16.04%	15.97%

Annualized Performance over Last 5 Years

	1 Month	YTD	1 Year	3 Years	5 Years
UP 60 Global	0.63%	7.28%	8.08%	11.38%	3.83%
Pictet LPP 2005 60 Plus TR	0.46%	6.38%	7.37%	10.20%	2.89%

Key Information

Foreign currency exposure	30.00%
Proportion of active investments	21.50%
Rebalancing	Weekly (according to the schedule set by the foundation)
Benchmark	Pictet LPP 2005 60 Plus TR
Total expense	0.51%

Key Risk-Return Statistics 5 Years

	Strategy	Benchmark
Standard Deviation	8.13%	8.71%
Sharpe Ratio	0.48	0.35
Max Drawdown	-17.42%	-17.87%
Tracking Error	2.21%	

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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