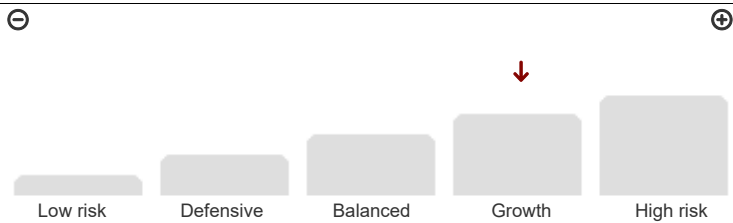


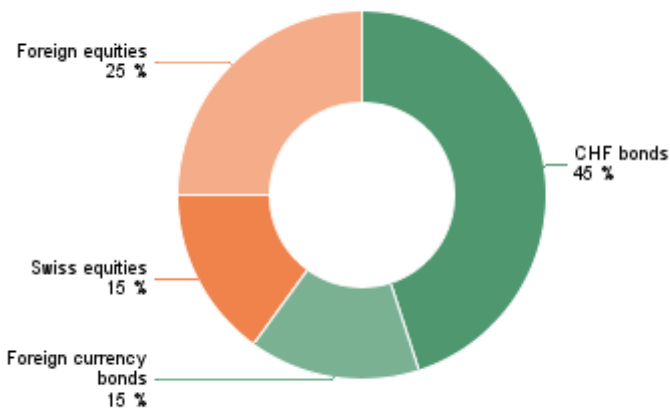
Strategy description

Strategy aiming to follow the Pictet LPP 40 2000 benchmark using passive funds managed by UBS Asset Management. This strategy's risk profile is tilted towards growth, consisting of a high allocation to equities, resulting in a high investment risk.

Risk profile



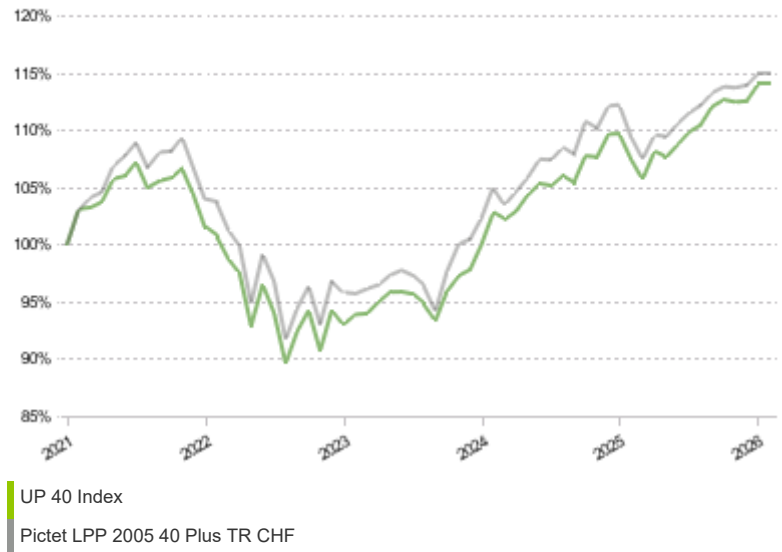
Strategic Asset Allocation



Key Information

| | |
|----------------------------------|--|
| Foreign currency exposure | 40.00% |
| Proportion of active investments | 0.00% |
| Rebalancing | Weekly (according to the schedule set by the foundation) |
| Benchmark | Pictet LPP 2005 40 Plus TR CHF |
| Total expense | 0.34% |

Historical Returns



Yearly returns

| | YTD | 2025 | 2024 | 2023 | 2022 | 2021 |
|--------------------------------|-------|-------|--------|-------|---------|--------|
| UP 40 Index | 1.41% | 4.47% | 10.62% | 7.16% | -14.91% | 6.89% |
| Pictet LPP 2005 40 Plus TR CHF | 1.14% | 3.23% | 10.09% | 7.45% | -14.92% | 10.05% |

Annualized Performance over Last 5 Years

| | 1 Month | YTD | 1 Year | 3 Years | 5 Years |
|--------------------------------|---------|-------|--------|---------|---------|
| UP 40 Index | 1.33% | 1.41% | 3.95% | 7.00% | 2.65% |
| Pictet LPP 2005 40 Plus TR CHF | 0.93% | 1.14% | 2.47% | 6.27% | 2.83% |

Key Risk-Return Statistics 5 Years

| | Strategy | Benchmark |
|--------------------|----------|-----------|
| Standard Deviation | 6.47% | 6.91% |
| Sharpe Ratio | 0.42 | 0.42 |
| Max Drawdown | -16.41% | -16.15% |
| Tracking Error | 1.46% | |

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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