

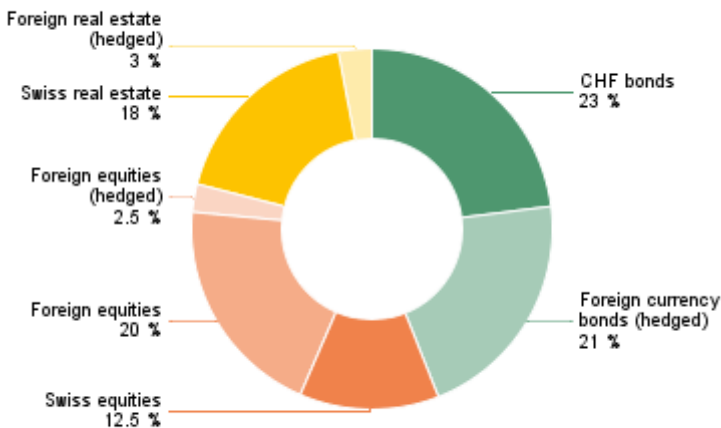
Strategy description

The strategy, inceptioned by FLP 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 balanced, consisting of a balanced allocation between equities and bonds, resulting in an average investment risk.

Risk profile



Strategic Asset Allocation



Key Information

Foreign currency exposure	20.00%
Proportion of active investments	21.65%
Rebalancing	Weekly (according to the schedule set by the foundation)
Benchmark	Pictet LPP 2005 40 Plus TR CHF
Total expense	0.50%

Historical Returns



Yearly returns

	YTD	2025	2024	2023	2022	2021
UP 35 Global	4.18%	6.21%	9.98%	5.58%	-14.26%	8.02%
Pictet LPP 2005 40 Plus TR CHF	3.79%	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 35 Global	1.28%	4.18%	9.01%	7.39%	2.19%
Pictet LPP 2005 40 Plus TR CHF	1.42%	3.79%	7.83%	6.63%	2.00%

Key Risk-Return Statistics 5 Years

	Strategy	Benchmark
Standard Deviation	6.23%	6.99%
Sharpe Ratio	0.35	0.29
Max Drawdown	-15.25%	-16.15%
Tracking Error	1.69%	

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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