LIBERTY
The independent pension platform

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# Selection Index 55

## Description

The "Selection Index 55" strategy invests in pure index funds and is implemented so as to ensure that the return and risk on the portfolio match the benchmark as closely as possible. The strategy is reviewed each year based on clearly defined selection criteria, and adjusted as necessary. You benefit from low product costs and the portfolio can be delivered to your private assets upon withdrawal. The strategic equity content is 55%.

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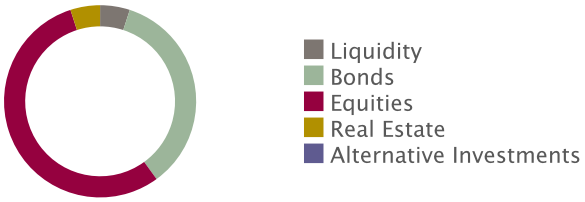
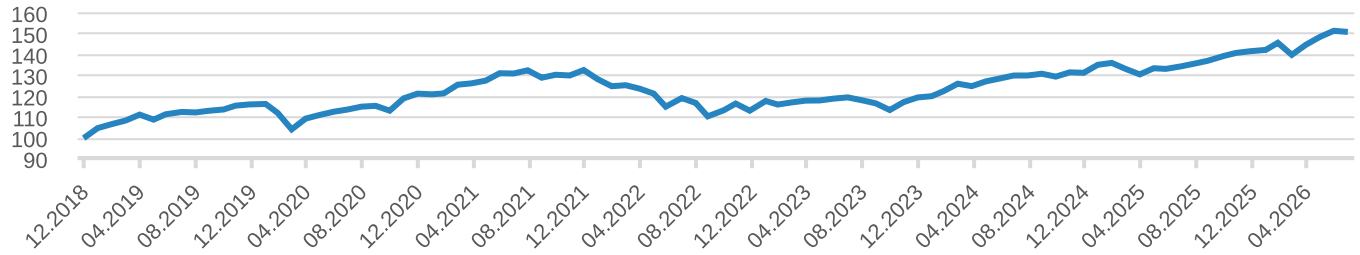
## Portfolio Composition

| Asset class | | Currency | |
|---|---|---|---|
| Liquidity | 5% | CHF | 73% |
| Bonds | 35% | Forex | 27% |
| Equities | 55% | | |
| Real Estate | 5% | | |
| Alternative Investments | 0% | | |




| Strategy | | TER |
|---|---|---|
| 22.0% | UBS (CH) Index Fund - Bonds CHF NSL A-acc | 0.17% |
| 13.0% | Swisscanto (CH) Index Bond Fund World (ex CHF) Aggregate FAH1 CHF | 0.20% |
| 28.0% | UBS (CH) Index Fund - Equities Switzerland All NSL A-acc | 0.16% |
| 19.0% | UBS (CH) Investment Fund - Equities Global Passive A-acc | 0.24% |
| 8.0% | UBS (CH) Index Fund - Equities Emerging Markets NSL A-acc | 0.28% |
| 5.0% | Swisscanto (CH) Index Real Estate Fund Switzerland indirect FA CHF | 0.91% |
| **Total** | | **0.22%** |

## Performance (indexed, in CHF)*




| | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Year |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2026 | 0.47% | 2.39% | -3.97% | 3.44% | 2.61% | 2.00% | -0.36% | | | | | | 6.56% |
| 2025 | 2.93% | 0.66% | -2.14% | -1.95% | 2.27% | -0.24% | 0.97% | 1.02% | 0.91% | 1.68% | 1.03% | 0.58% | 7.88% |
| 2024 | 0.51% | 2.05% | 2.88% | -0.94% | 1.82% | 1.11% | 1.11% | 0.01% | 0.66% | -1.07% | 1.59% | -0.17% | 9.91% |
| 2023 | 4.12% | -1.46% | 0.89% | 0.73% | 0.06% | 0.75% | 0.50% | -1.13% | -1.27% | -2.76% | 3.38% | 1.88% | 5.61% |
| 2022 | -3.32% | -2.62% | 0.39% | -1.34% | -1.90% | -5.18% | 3.60% | -1.97% | -5.50% | 2.64% | 2.83% | -2.92% | -14.70% |
| 2021 | -0.28% | 0.36% | 3.46% | 0.51% | 1.03% | 2.78% | -0.10% | 1.17% | -2.67% | 1.08% | -0.25% | 2.00% | 9.33% |

| | YTD | 1 Year | 3 Years p.a. | 5 Years p.a. |
|---|---|---|---|---|
| Performance* | 6.56% | 12.24% | 8.09% | 2.88% |

*The performance is based on a model portfolio with monthly rebalancing.

## Methodology

The index funds are selected according to six predefined criteria (benchmark, performance, cost, deliverability, distribution approval and volume). The best product in the peer group is then chosen and weighted according to the strategic asset allocation in the "Selection Index 55" strategy. The dynamic strategy is quantitatively reviewed once a year and adjusted by the Board of Trustees.

## Disclaimer


For further information, please contact your consultant. Past performance is no indication of future performance and no guarantee of future values or results. Please refer to the legal notices under http://factsheet.liberty.ch/en.