LIBERTY
The independent pension platform

31.07.2026

Selection Index 75

Description

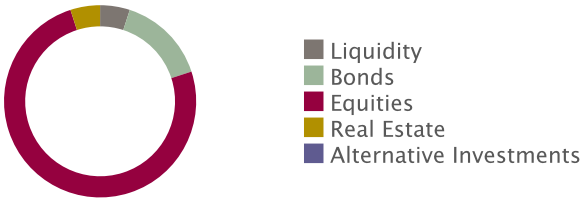
The "Selection Index 75" strategy invests in pure index funds and is implemented so as to ensure that the return and risk on the portfolio match the benchmark as closely as possible. The strategy is reviewed each year based on clearly defined selection criteria, and adjusted as necessary. You benefit from low product costs and the portfolio can be delivered to your private assets upon withdrawal. The strategic equity content is 75%.

Contact

Liberty Pension
Mail info@liberty.ch
Phone +41 58 733 03 22
Web www.liberty.ch

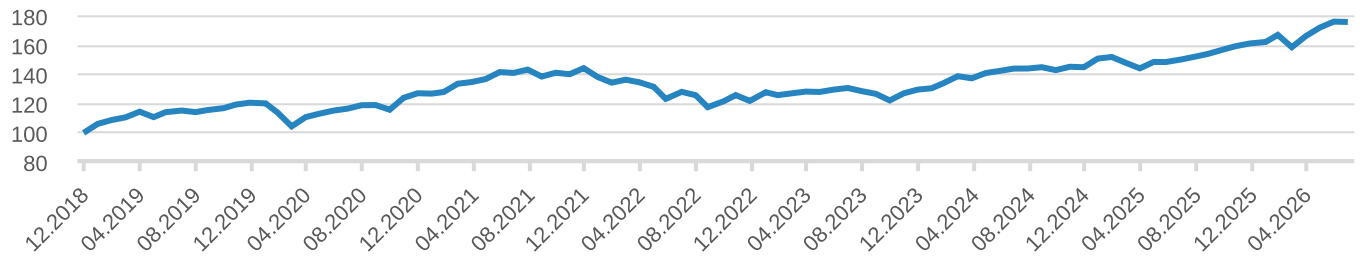
Portfolio Composition

Asset class		Currency	
Liquidity	5%	CHF	70%
Bonds	15%	Forex	30%
Equities	75%		
Real Estate	5%		
Alternative Investments	0%		



Strategy		TER
12.0%	UBS (CH) Index Fund - Bonds CHF NSL A-acc	0.17%
3.0%	Swisscanto (CH) Index Bond Fund World (ex CHF) Aggregate FAH1 CHF	0.20%
38.0%	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%
7.0%	UBS (CH) Index Fund - Equities World ex CH (CHF hedged) A-acc	0.34%
11.0%	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		**0.23%**

Performance (indexed, in CHF)*



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
2026	0.65%	2.99%	-5.08%	4.81%	3.51%	2.38%	-0.14%						9.14%
2025	4.09%	0.73%	-2.62%	-2.56%	3.05%	-0.05%	1.23%	1.32%	1.14%	2.04%	1.41%	1.15%	11.25%
2024	0.72%	2.73%	3.50%	-1.04%	2.62%	1.04%	1.12%	0.04%	0.62%	-1.37%	1.61%	-0.23%	11.83%
2023	4.90%	-1.56%	0.99%	0.94%	-0.19%	1.26%	0.85%	-1.64%	-1.44%	-3.57%	3.99%	2.00%	6.39%
2022	-4.20%	-2.82%	1.51%	-1.34%	-2.28%	-6.28%	3.93%	-1.83%	-6.49%	3.45%	3.49%	-3.21%	-15.59%
2021	-0.19%	0.86%	4.46%	0.86%	1.51%	3.50%	-0.40%	1.62%	-3.33%	1.87%	-0.70%	2.97%	13.55%

	YTD	1 Year	3 Years p.a.	5 Years p.a.
Performance*	9.14%	17.06%	10.42%	4.53%

*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 75" 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.