LIBERTY

The independent pension platform

31.07.2026

Selection Index 55 ESG

Description

The "Selection Index 55 ESG" 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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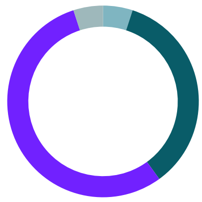
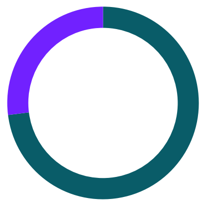
Portfolio Composition

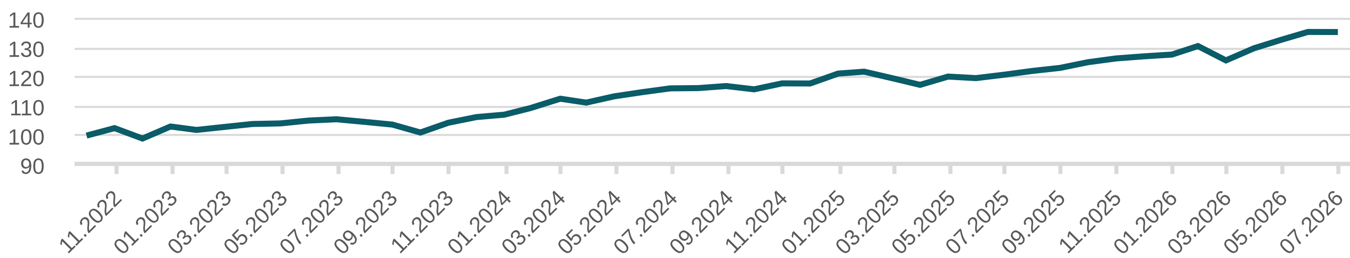
Asset class		Currency	
Liquidity	5%	CHF	73%
Bonds	35%	Forex	27%
Equities	55%		
Real Estate	5%		
Alternative Investments	0%		



Strategy		TER
29.0%	iShares SBI® ESG AAA-BBB Bond Index Fund (CH) D CHF	0.15%
6.0%	Vanguard ESG Global Corporate Bond Index Fund - CHF Hedged Acc	0.20%
28.0%	UBS (CH) Index Fund - Equities Switzerland All ESG NSL A-acc	0.14%
21.0%	Swisscanto (CH) Index Equity Fund World (ex CH) Responsible FA CHF	0.25%
6.0%	Swisscanto (CH) Index Equity Fund Emerging Markets Responsible FA CHF	0.28%
5.0%	Swisscanto (CH) Real Estate Fund Responsible Switzerland indirect (I) DT CHF	1.22%
Total		**0.23%**



Performance (indexed, in CHF)*



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
2026	0.47%	2.28%	-3.76%	3.29%	2.30%	1.97%	-0.01%						6.54%
2025	2.88%	0.54%	-1.82%	-1.91%	2.41%	-0.44%	0.97%	1.06%	0.85%	1.59%	1.03%	0.58%	7.89%
2024	0.78%	2.10%	2.94%	-1.19%	1.93%	1.26%	1.13%	0.08%	0.61%	-0.97%	1.77%	-0.03%	10.84%
2023	4.17%	-1.13%	1.00%	0.98%	0.20%	0.93%	0.43%	-0.84%	-0.89%	-2.62%	3.32%	1.84%	7.42%
2022											2.55%	-3.48%	-1.01%

	YTD	1 Year	3 Years p.a.	5 Years p.a.
Performance*	6.54%	12.10%	8.66%	n/a

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

Methodology

The funds used are committed to the “ESG approach”, although there is no uniform approach to implementation. ESG stands for the aspects environment (E), social (S) and corporate governance (G). ESG funds normally reduce or avoid risks associated with sectors such as weapons, tobacco, fossil fuels, gambling or adult entertainment. Engagement with companies is also often sought (“stewardship voting" / "engagement”).

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.