

ETF-baseret investeringsportefølje

Lang tidshorisont, højrisiko.
86 % aktier, 12 % obligationer, 2 % ejendomme



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Forslag baseret på Kerne-Satellit strategien

Individuel:
Afkast/risiko tilpasning

Din individuelle portefølje

Satellit-investering
Robot-industrien
Unoterede EU-aktier
20 %

Satellit-investering
EU-aktier
20 %

Satellit-investering
Små aktier USA)
10 %

Sikkert fundament
(Aktiv porteføljepleje)

Kerne-investering = Optimal Invest 50 %

- Global risikospredning - stor formuesikkerhed
- Stort antal forskellige aktivklasser (aktier, obligationer osv.)
- Optimal sammensætning af aktivklasser- stabilitet



Dit individuelle porteføljeforslag

Navn	Aktivklasse	Fordeling
Investin Optimal Livscyklus 2040-50	Blandede (ETF'er)	50%
iShares Core EURO STOXX 50 UCITS ETF (EUR)	Aktier (50 største EU)	10%
iShares S&P Small Cap 600 UCITS ETF USD (Dist) (EUR)	Aktier vandrensnig	10%
iShares Listed Private Equity UCITS ETF (EUR)	Aktier (unoteret)	10%
db x-trackers Stoxx® Europe 600 UCITS ETF (DR) 1C (EUR)	Aktier (600 største EU)	10%
ROBO Global® Robotics and Automation GO UCITS ETF	Aktier robotindustri	10%

Aktier = 76 %, Ejendom = 2 %, Private Equity = 10 % og Obligationer = 12 %



Omkostninger - porteføljeforslag

Navn	Investeringsstype	Fordeling	ÅOP	Total ÅOP
Investin Optimal Livscyklus 2040-50	Investeringsforening (Aktier/obligationer)	50,0%	0,54%	0,27%
iShares Core EURO STOXX 50 UCITS ETF (EUR)	ETF	10,0%	0,10%	0,01%
iShares S&P Small Cap 600 UCITS ETF USD (Dist) (EUR) IUS3	ETF	10,0%	0,40%	0,04%
iShares Listed Private Equity UCITS ETF (EUR)	ETF	10,0%	0,75%	0,08%
db x-trackers Stoxx® Europe 600 UCITS ETF (DR) 1C (EUR)	ETF	10,0%	0,20%	0,02%
ROBO Global® Robotics and Automation GO UCITS ETF (EUR)	ETF	10,0%	0,80%	0,08%
Årlig løbende total omkostninger				0,50%

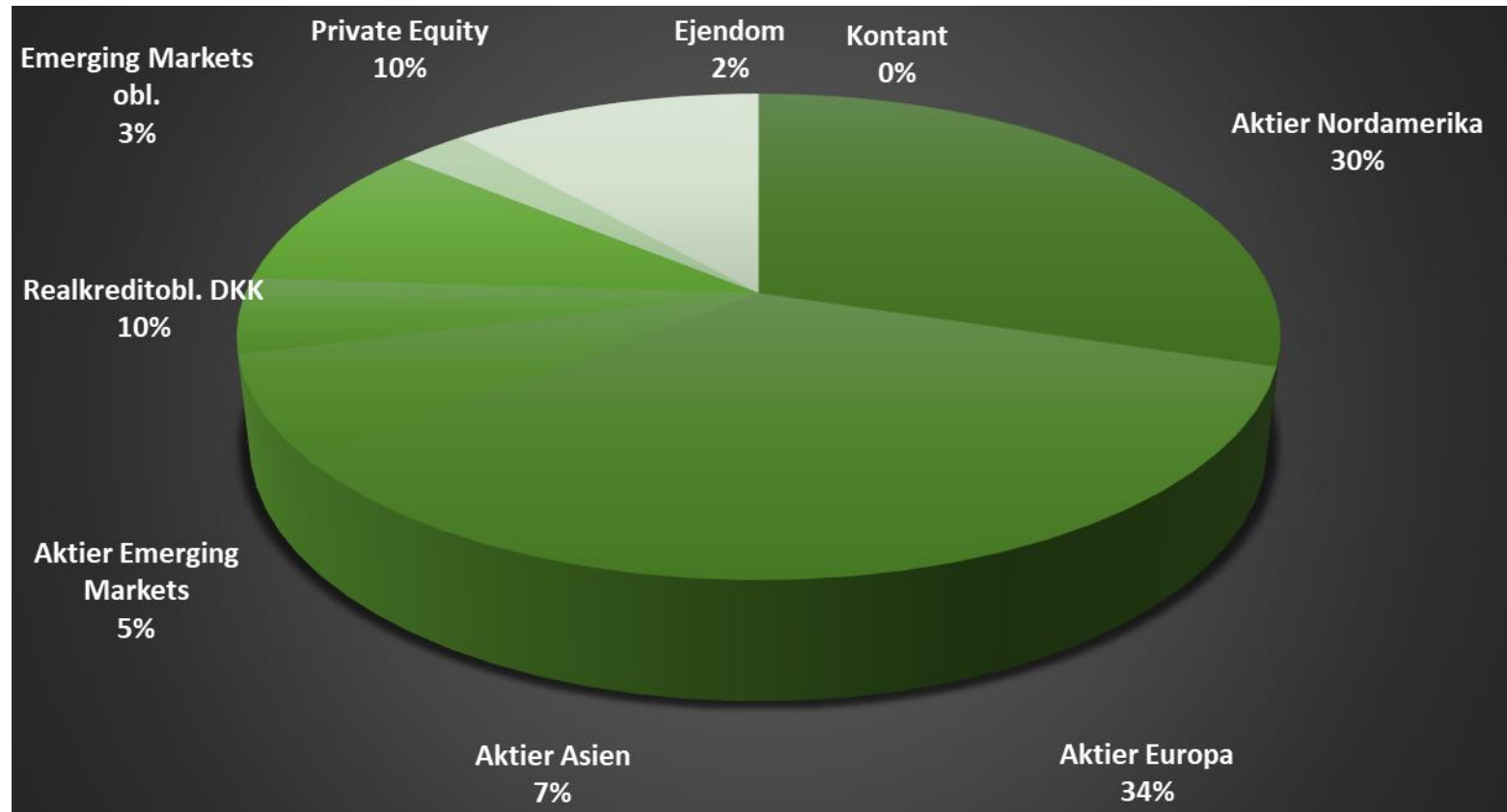


Årlige omkostninger ved traditionel Private Banking for velhavere = 1,5-2,5 %
(15.000 kr. til 25.000 kr. pr. 1 mio kr. formue)

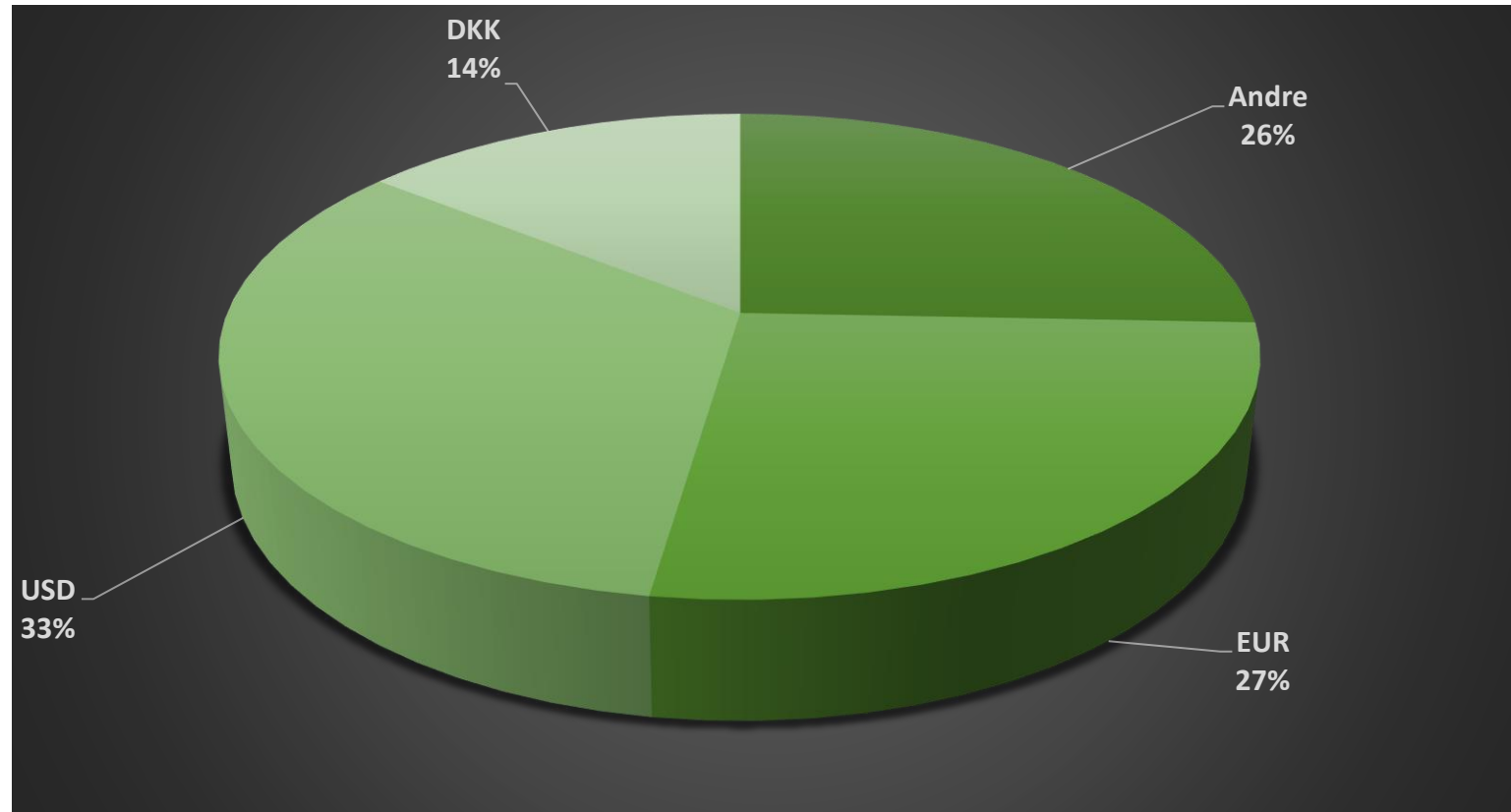
Årlige besparelse er ca. 15.000 kr. pr. 1 mio. kr. formue

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Aktivfordelingen i din portefølje



Valutafordelingen i din portefølje



Din indkøbsliste

Navn	Køb her	Ticker	ISIN	Fordeling
Investin Optimal Livscyklus 2040-50	Køb her		DK0060946192	50%
iShares Core EURO STOXX 50 UCITS ETF (EUR) SXRT	Køb her	SXRT	IE00B53L3W79	10%
iShares S&P Small Cap 600 UCITS ETF USD (Dist) (EUR) IUS3	Køb her	IUS3	IE00B2QWCY14	10%
iShares Listed Private Equity UCITS ETF (EUR) IQQL	Køb her	IQQL	IE00B1TXHL60	10%
db x-trackers Stoxx® Europe 600 UCITS ETF (DR) 1C (EUR) DX2X	Køb her	DX2X	LU0328475792	10%
ROBO Global® Robotics and Automation GO UCITS ETF (EUR) IROB	Køb her	IROB	DE000A12GJD2	10%

Vi anbefaler at benytte Nordnet, når du handler ETF'ere.
Benyt 'køb her'-linket eller søg papiret via ticker eller ISIN.



Ansvarsfraskrivelse

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