

Indeks-baseret investeringsportefølje

Mellemlang tidshorizont, høj risiko.
32 % obligationer, 66 % aktier, 2 % ejendomme



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Forslag baseret på Kerne-Satellit strategien

Individuel:
Afkast/risiko tilpasning

Din individuelle portefølje

Satellit-investering
EU-aktier(large cap)
10 %

Satellit-investering
Danske aktier
20 %

Satellit-investering
Globale aktier
20 %

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 Stabil	Blandede	40%
Investin Optimal Livscyklus 2030-40	Blandede	10%
Sparinvest INDEX Europa Value	Europæiske aktier	10%
Sparinvest INDEX OMX C25 Capped	Danske aktier	20%
Sparinvest INDEX Globale Aktier Min. Risiko	Globale (stabile) aktier	20%

Aktier = 66 %, Ejendom = 2 %, Obligationer = 32 %



Omkostninger - porteføljeforslag

Navn	Investeringsstype	Fordeling	ÅOP	Total ÅOP
Investin Optimal Stabil	Investeringsforening	40,0%	0,64%	0,26%
Investin Optimal Livscyklus 2030-40	Investeringsforening	10,0%	0,64%	0,06%
Sparinvest INDEX Europa Value	Investeringsforening	10,0%	0,60%	0,06%
Sparinvest INDEX OMX C20 Capped	Investeringsforening	20,0%	0,57%	0,11%
Sparinvest INDEX Globale Aktier Min. Risiko	Investeringsforening	20,0%	0,56%	0,11%
Årlig løbende total omkostninger				0,61%

Årlige omkostninger ved traditionel Private Banking for velhavere = 1,5-2,5 %

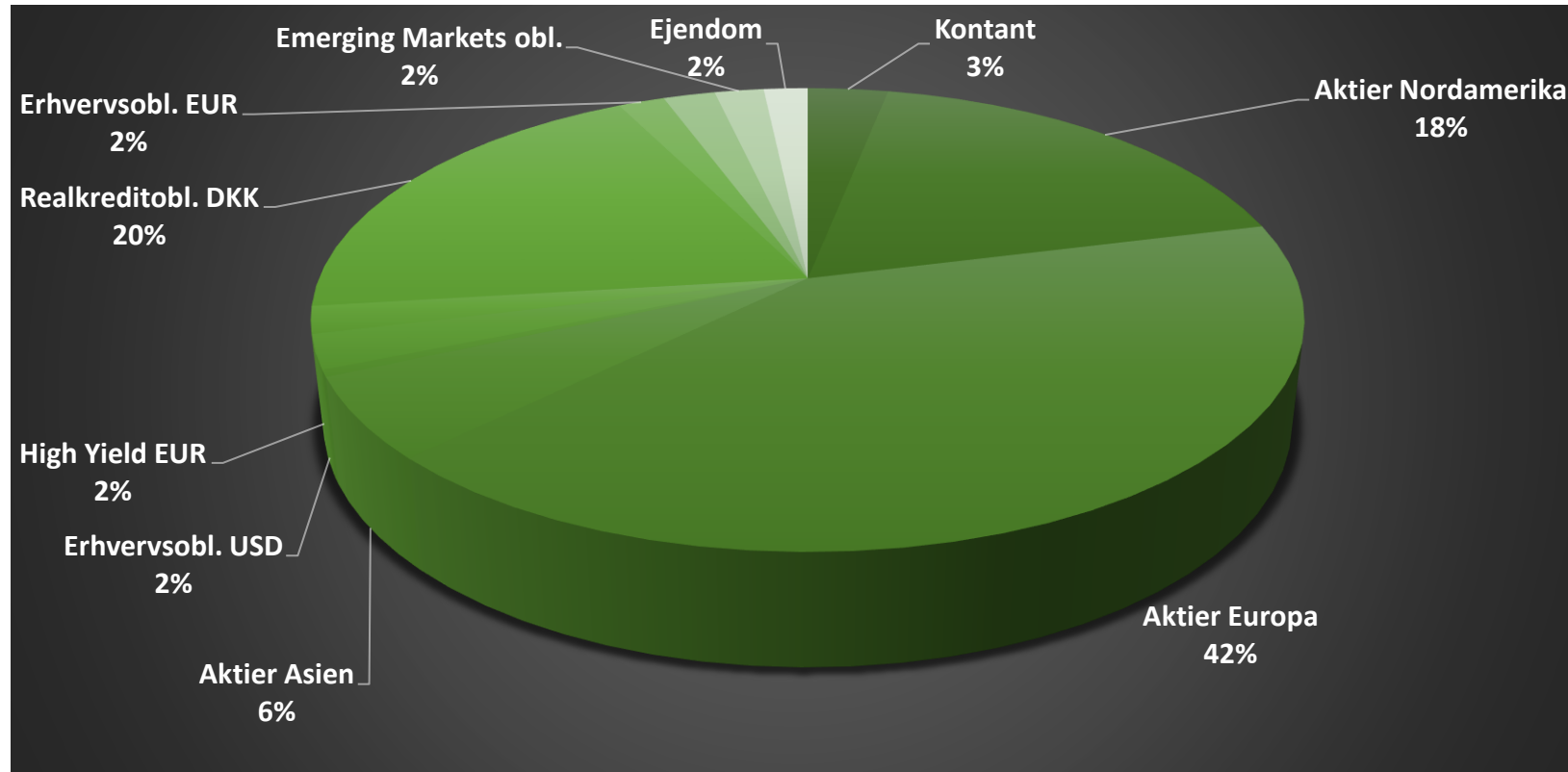
(15.000 kr. til 25.000 kr. pr. 1 mio. kr. formue)

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

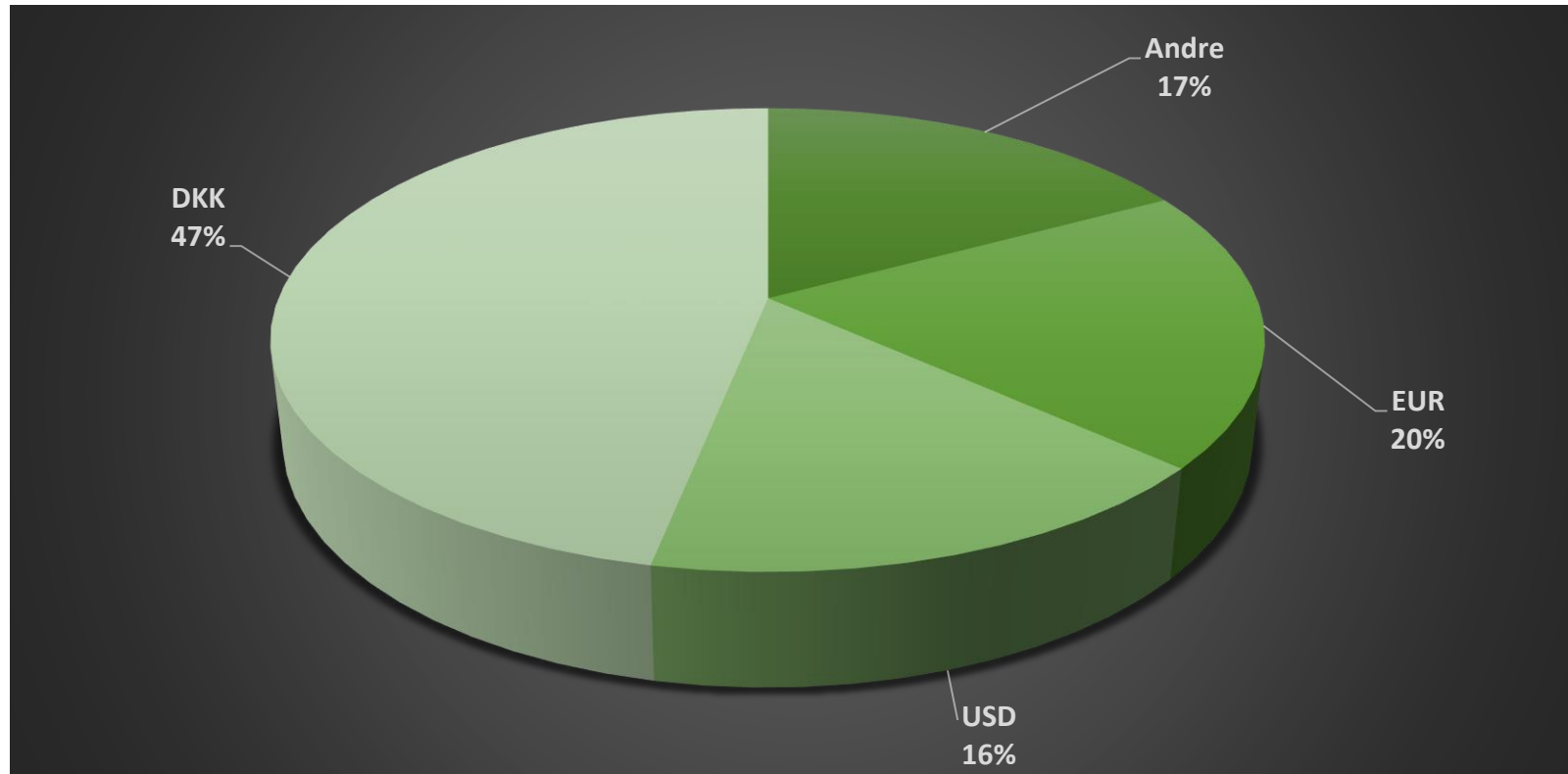


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Aktivfordelingen i din portefølje



Valutafordelingen i din portefølje



Din indkøbsliste

Navn	ISIN	Fordeling
Investin Optimal Stabil	DK0060518710	40%
Investin Optimal Livscyklus 2030-40	DK0060518983	10%
Sparinvest INDEX Europa Value	DK0010297704	10%
Sparinvest INDEX OMX C20 Capped	DK0060442556	20%
Sparinvest INDEX Globale Aktier Min. Risiko	DK0060031847	20%

Ovennævnte investeringsforeninger kan købes i alle banker.
Benyt ISIN (Fondskode) til at søge det enkelte papir i din net-bank.



Ansvarsfraskrivelse

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Moreover prospective investors should conduct such investigations as the investor deems necessary and should seek their own legal accounting and tax advice in order to make an independent determination of the suitability and consequences of an investment in the securities

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