

Indeks-baseret investeringsportefølje

Kort tidshorisont, høj risiko.
57 % obligationer, 40 % aktier, 3 % ejendomme



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Forslag baseret på Kerne-Satellit strategien

Individuel:
Afkast/risiko tilpasning

Din individuelle portefølje

Satellit-investering
Globale aktier
10 %

Satellit-investering
DK-obligationer
30 %

Sikkert fundament
(Aktiv porteføljepleje)

Kerne-investering = Optimal Invest 60 %

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



Dit individuelle porteføljeforslag

Navn	Aktivklasse	Fordeling
Investin Optimal VerdensIndex Moderat	Blandede	30%
Investin Optimal Livscyklus 2030-40	Blandede	30%
Sparinvest INDEX Globale Aktier Min. Risiko	Globale aktier	10%
Maj Invest Danske Obligationer Udb	Danske obligationer	30%

Aktier = 40 %, Ejendom = 3 % og Obligationer = 57 %



Omkostninger - porteføljeforslag

Navn	Investeringsstype	Fordeling	ÅOP	Total ÅOP
Investin Optimal VerdensIndex Moderat	Investeringsforening	30,0%	0,64%	0,19%
Investin Optimal Livscyklus 2030-40	Investeringsforening	30,0%	0,64%	0,19%
Sparinvest INDEX Globale Aktier Min. Risiko	Investeringsforening	10,0%	0,56%	0,06%
Maj Invest Danske Obligationer Udb	Investeringsforening	30,0%	0,33%	0,10%

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

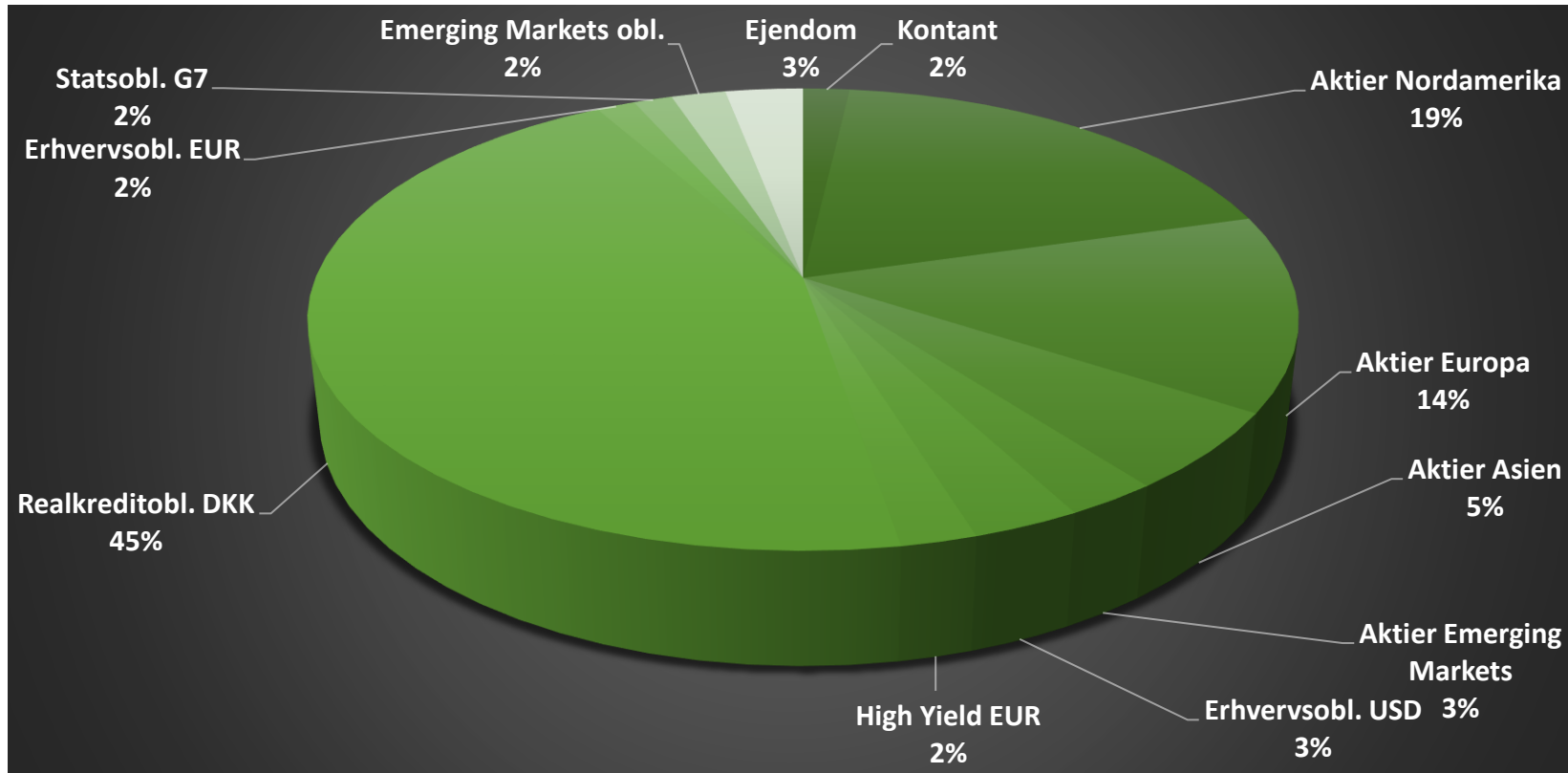
(15.000 kr. til 25.000 kr. pr. 1 mio. kr. formue)

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

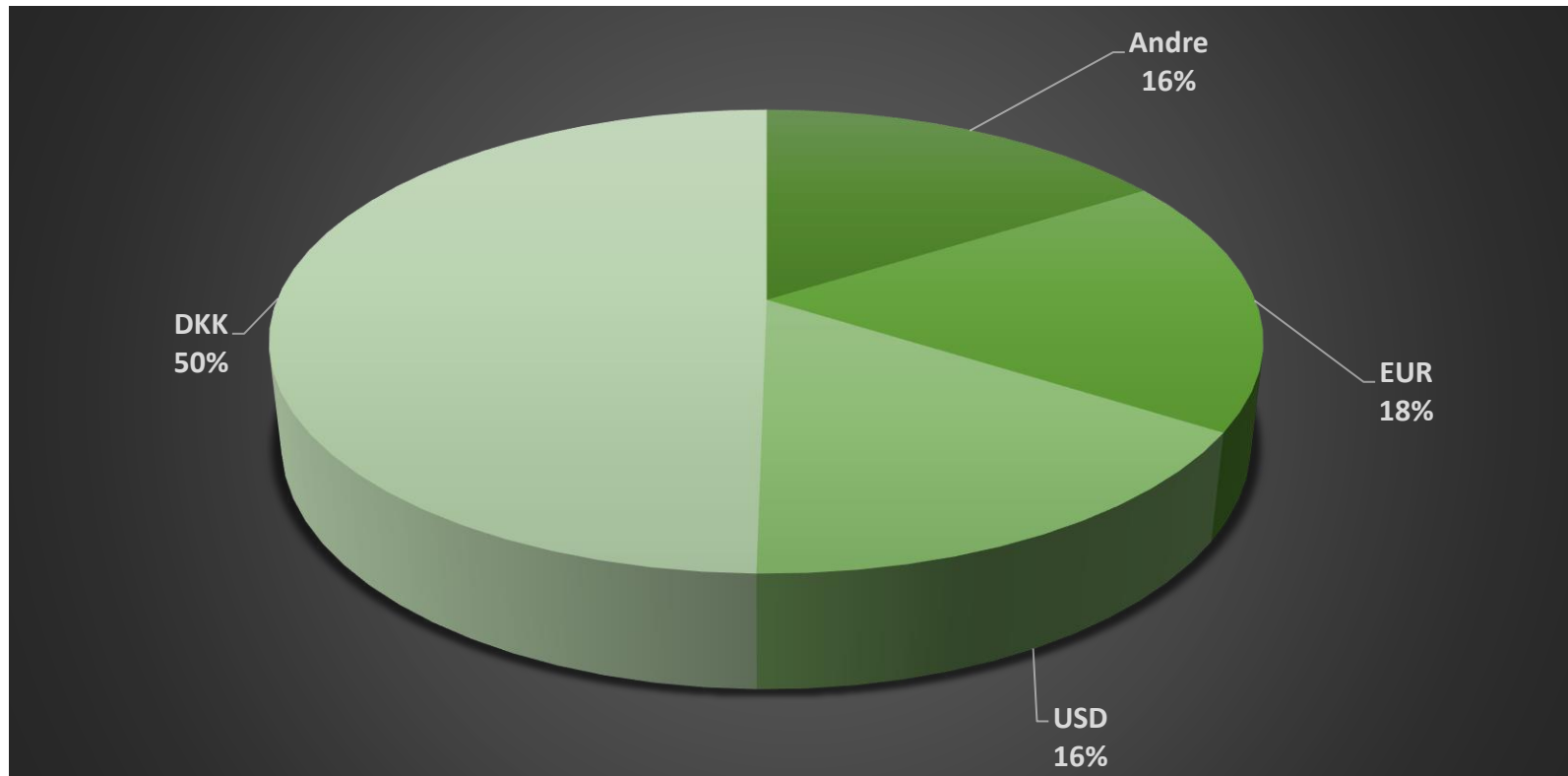


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Aktivfordelingen i din portefølje



Valutafordelingen i din portefølje



Din indkøbsliste

Navn	ISIN	Fordeling
Investin Optimal VerdensIndex Moderat	DK0060254712	30%
Investin Optimal Livscyklus 2030-40	DK0060518983	30%
Sparinvest INDEX Globale Aktier Min. Risiko	DK0060031847	10%
Maj Invest Danske Obligationer Udb.	DK0060005098	30%

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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