

ETF-baseret investeringsportefølje

Mellemlang tidshorisont, lav risiko.
35 % aktier, 62,5 % obligationer, 2,5 % ejendomme



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Forslag baseret på Kerne-Satellit strategien

Individuel:
Afkast/risiko tilpasning

Din individuelle portefølje

Satellit-investering
DK obligationer
32 %

Satellit-investering
Små EU aktier
10 %

Satellit-investering
Stabile aktier (EU)
8 %

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	25%
Investin Optimal VerdensIndex Moderat	Blandede	25%
Maj Invest Danske Obligationer Udb	Obligationer	32%
db x-trackers S&P Global Infrastructure UCITS ETF 1C (EUR) DX2E	Infrastruktur	8%
iShares Edge MSCI Europe Minimum Volatility UCITS ETF (EUR) EUN0	Stabile aktier (EU)	10%

Aktier = 35 %, Ejendom = 2,5 %, Infrastruktur = 6 % og Obligationer = 62,5 %



Omkostninger - porteføljeforslag

Navn	Investeringsstype	Fordeling	ÅOP	Total ÅOP
Investin Optimal Stabil	Investeringsforening	25,0%	0,64%	0,16%
Investin Optimal VerdensIndex Moderat	Investeringsforening	25,0%	0,64%	0,16%
Maj Invest Danske Obligationer Udb	Investeringsforening	32,0%	0,33%	0,11%
db x-trackers S&P Global Infrastructure UCITS ETF 1C (EUR) DX2E	ETF	8,0%	0,60%	0,05%
iShares Edge MSCI Europe Minimum Volatility UCITS ETF (EUR) EUN0	ETF	10,0%	0,25%	0,03%
Årlig løbende total omkostninger				0,50%

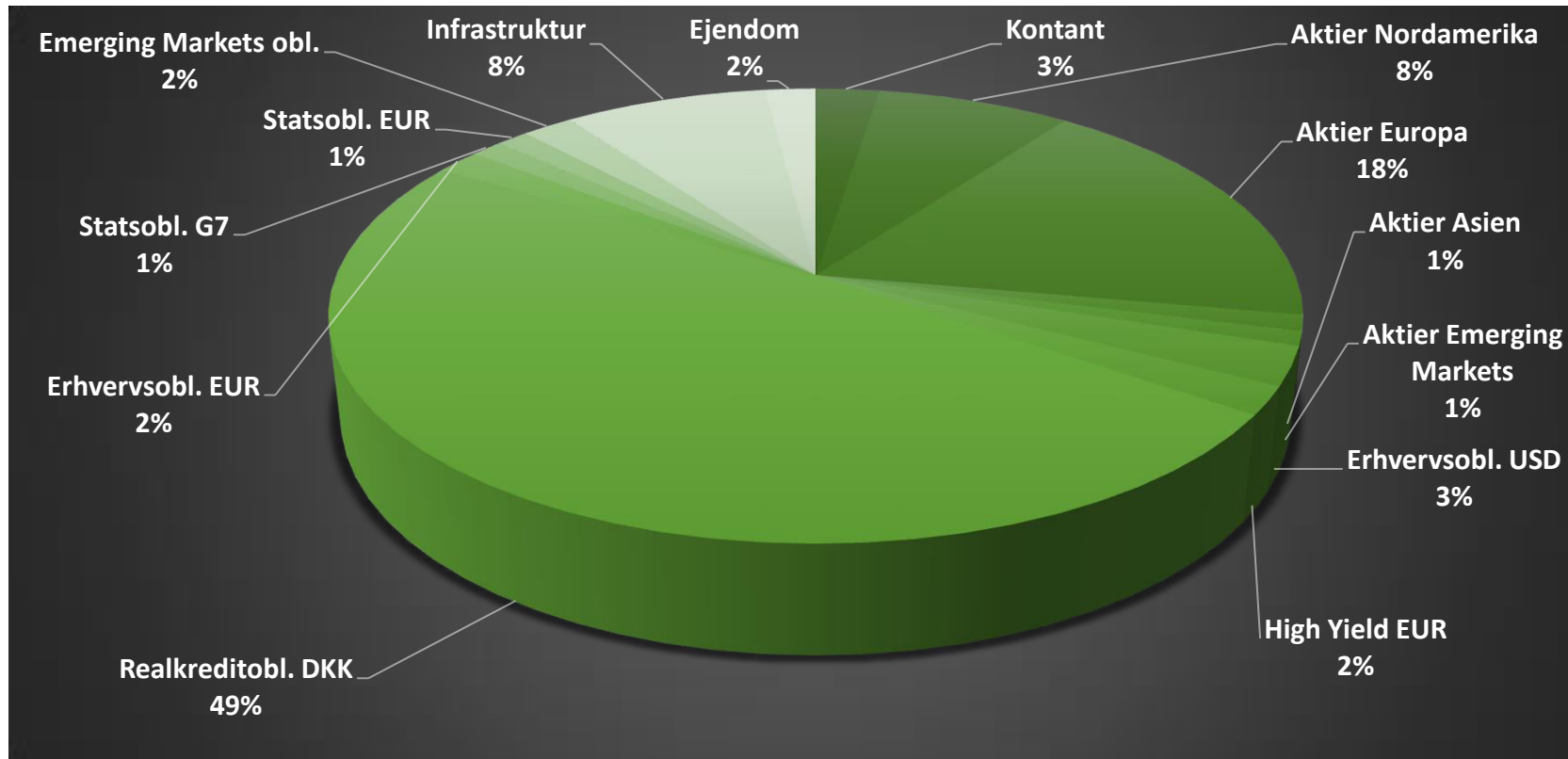


Årlige omkostninger ved traditionel Private Banking for velhavere = 1,5-2,5 %
(15.000 kr. til 25.000 kr. pr. 1 mio kr. formue)

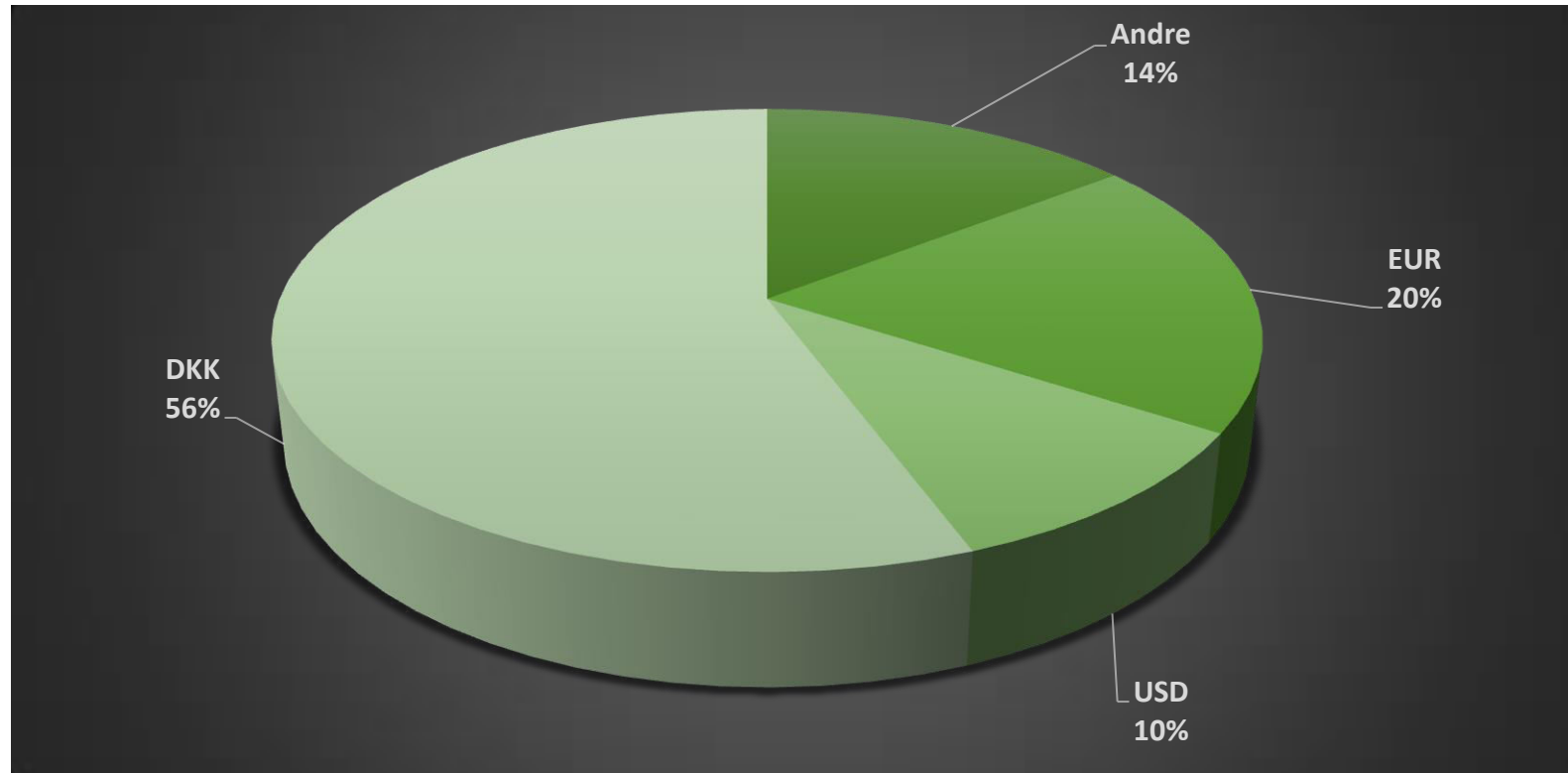
Årlige besparelse er ca. 15.000 kr. pr. 1 mio. kr. formue

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Aktivfordelingen i din portefølje



Valutafordelingen i din portefølje



Din indkøbsliste

Navn	Køb her	Ticker	ISIN	Fordeling
Investin Optimal Stabil	Køb her		DK0060518710	25%
Investin Optimal VerdensIndex Moderat	Køb her		DK0060254712	25%
Maj Invest Danske Obligationer Udb	Køb her		DK0060005098	32%
db x-trackers S&P Global Infrastructure UCITS ETF 1C (EUR)	Køb her	DX2E	LU0322253229	8%
iShares Edge MSCI Europe Minimum Volatility UCITS ETF (EUR)	Køb her	EUN0	DE000A1KB2C1	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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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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