

Indeks-baseret investeringsportefølje

Kort tidshorizont, lav risiko
86 % obligationer, 12,5 % aktier, 1,5 % ejendomme



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Forslag baseret på Kerne-Satellit strategien

Individuel:
Afkast/risiko tilpasning

Din individuelle portefølje

Satellit-investering
DK realkredit-
obligationer
30 %

Satellit-investering
EM-obligationer
15 %

Satellit-investering
Virksomheds-
obligationer
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 Stabil	Blandede	50%
Maj Invest Danske Obligationer Udb	Obligationer	30%
iShares J. P. Morgan \$ EM Bond EUR Hedged UCITS ETF (EUR) IS3C	Obligationer (EM)	10%
iShares Core Euro Corporate Bond UCITS ETF (EUR) EUN5	Virksomhedsobligationer (EU)	10%

Aktier = 12,5 %, Ejendom = 1,5 % og Obligationer = 86 %



Omkostninger - porteføljeforslag

Navn	Investeringsstype	Fordeling	ÅOP	Total ÅOP
Investin Optimal Stabil	Investeringsforening	50,0%	0,64%	0,32%
Maj Invest Danske Obligationer Udb	Investeringsforening	30,0%	0,33%	0,10%
iShares J. P. Morgan \$ EM Bond EUR Hedged UCITS ETF (EUR) IS3C	ETF	10,0%	0,50%	0,05%
iShares Core Euro Corporate Bond UCITS ETF (EUR) EUN5	ETF	10,0%	0,20%	0,02%
Årlig løbende total omkostninger				0,49%

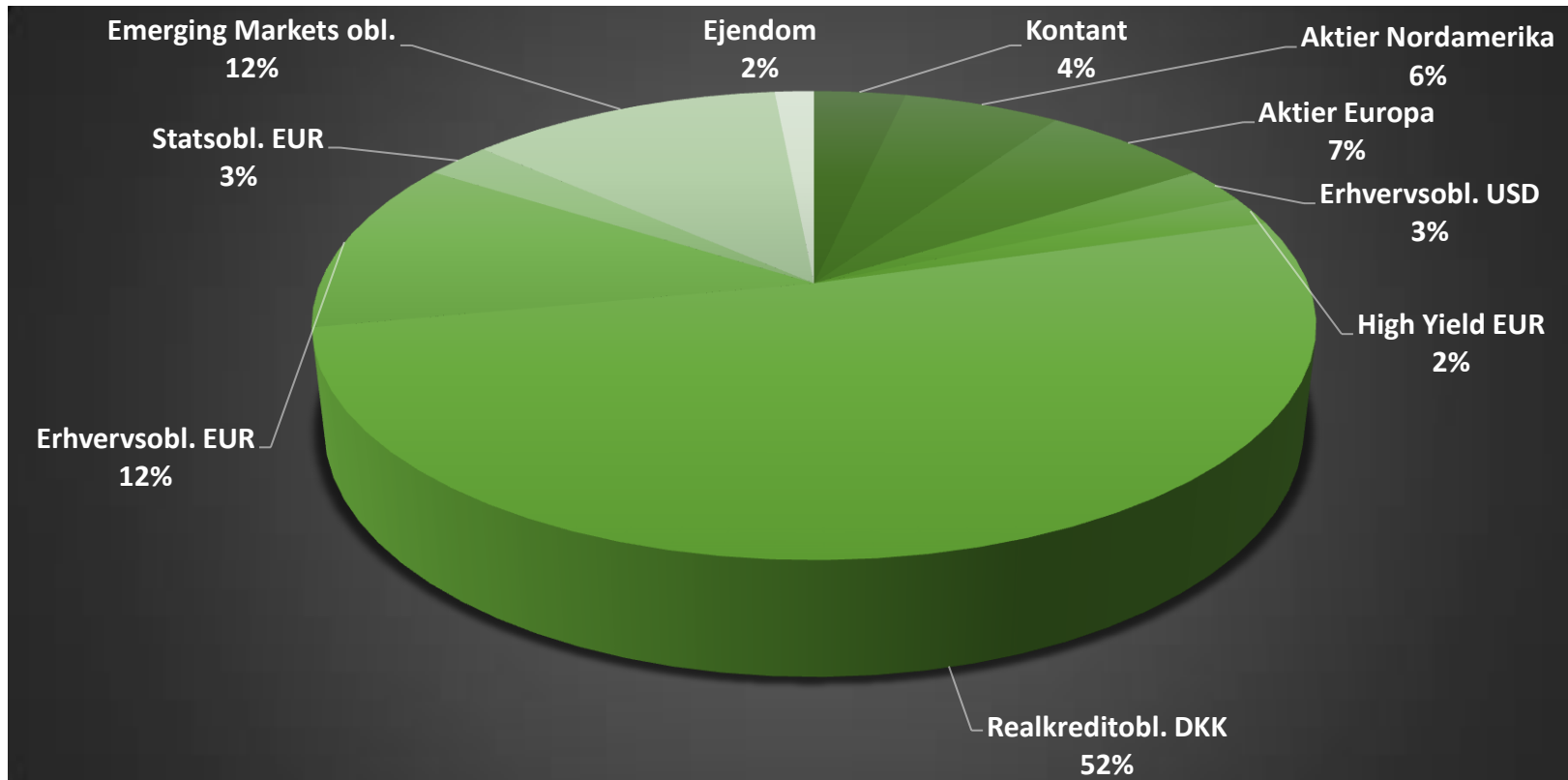


Årlige omkostninger ved traditionel Private Banking for velhavere = 1,5-2,5 %
(15.000 kr. til 25.000 kr. pr. 1 mio kr. formue)

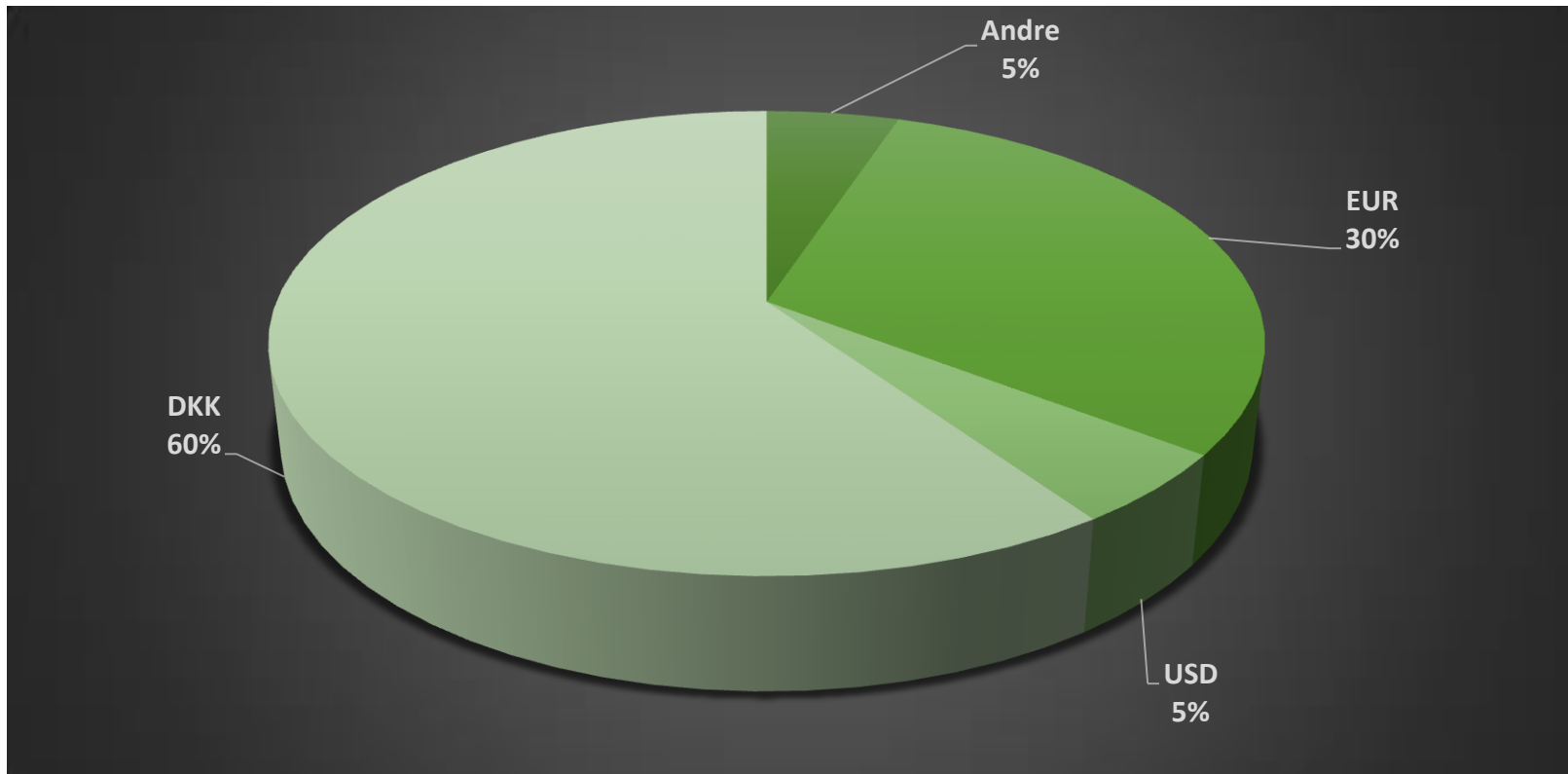
Årlige besparelse er ca. 15.000 kr. pr. 1 mio. kr. formue

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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	50%
Maj Invest Danske Obligationer Udb.	Køb her		DK0060005098	30%
iShares J. P. Morgan \$ EM Bond EUR Hedged UCITS ETF (EUR)	Køb her	IS3C	DE000A1W0PN8	10%
iShares Core Euro Corporate Bond UCITS ETF (EUR)	Køb her	EUN5	IE00B3F81R35	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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