

Indeks-baseret investeringsportefølje

Kort tidshorisont, høj risiko.
60 % obligationer, 39 % aktier, 1 % ejendomme



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Forslag baseret på Kerne-Satellit strategien

Individuel:
Afkast/risiko tilpasning

Din individuelle portefølje

Satellit-investering
EU-aktier ESG

10 %

Satellit-investering
EM-obligationer

15 %

Satellit-investering
Infrastruktur
Private Equity

10 %

Sikkert fundament
(Aktiv porteføljepleje)

Kerne-investering = Optimal Invest 65 %

- 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 (ETF'er)	35%
Investin Optimal Livscyklus 2030-40	Blandede (ETF'er)	30%
iShares J. P. Morgan \$ EM Bond EUR Hedged UCITS ETF (EUR)	Obligationer EM	15%
iShares Listed Private Equity UCITS ETF (EUR)	Aktier (unoteret)	5%
db x-trackers S&P Global Infrastructure UCITS ETF 1C (EUR)	Aktier Infrastruktur	5%
iShares MSCI Europe ESG Enhanced UCITS ETF EUR Acc	Aktier Europa ESG	10%

Aktier = 29 %, Ejendom = 1 %, Infrastruktur = 5 %, Private Equity = 5% og Obligationer = 60 %



Omkostninger - porteføljeforslag

Navn	Investeringsstype	Fordeling	ÅOP	Total ÅOP
Investin Optimal Stabil	Investeringsforening (aktier/obligationer)	35,0%	0,61%	0,21%
Investin Optimal Livscyklus 2030-40	Investeringsforening (aktier/obligationer)	30,0%	0,54%	0,16%
iShares J. P. Morgan \$ EM Bond EUR Hedged UCITS ETF (EUR)	ETF	15,0%	0,50%	0,08%
iShares Listed Private Equity UCITS ETF (EUR)	ETF	5,0%	0,75%	0,04%
db x-trackers S&P Global Infrastructure UCITS ETF 1C (EUR)	ETF	5,0%	0,60%	0,03%
iShares MSCI Europe ESG Enhanced UCITS ETF EUR Acc	ETF	10,0%	0,12%	0,01%
Årlig løbende total omkostninger				0,53%

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

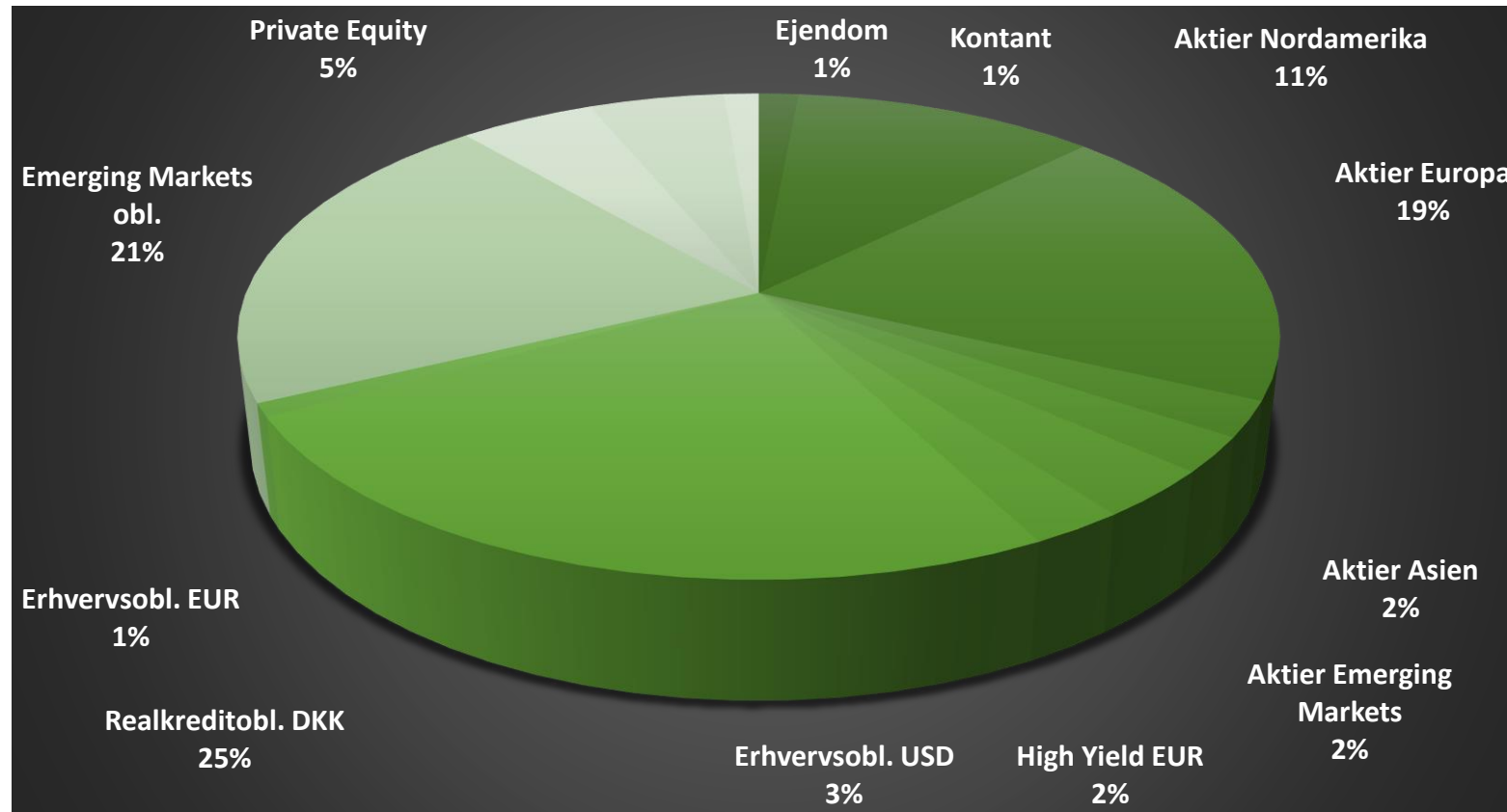
(15.000 kr. til 25.000 kr. pr. 1 mio. kr. formue)

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

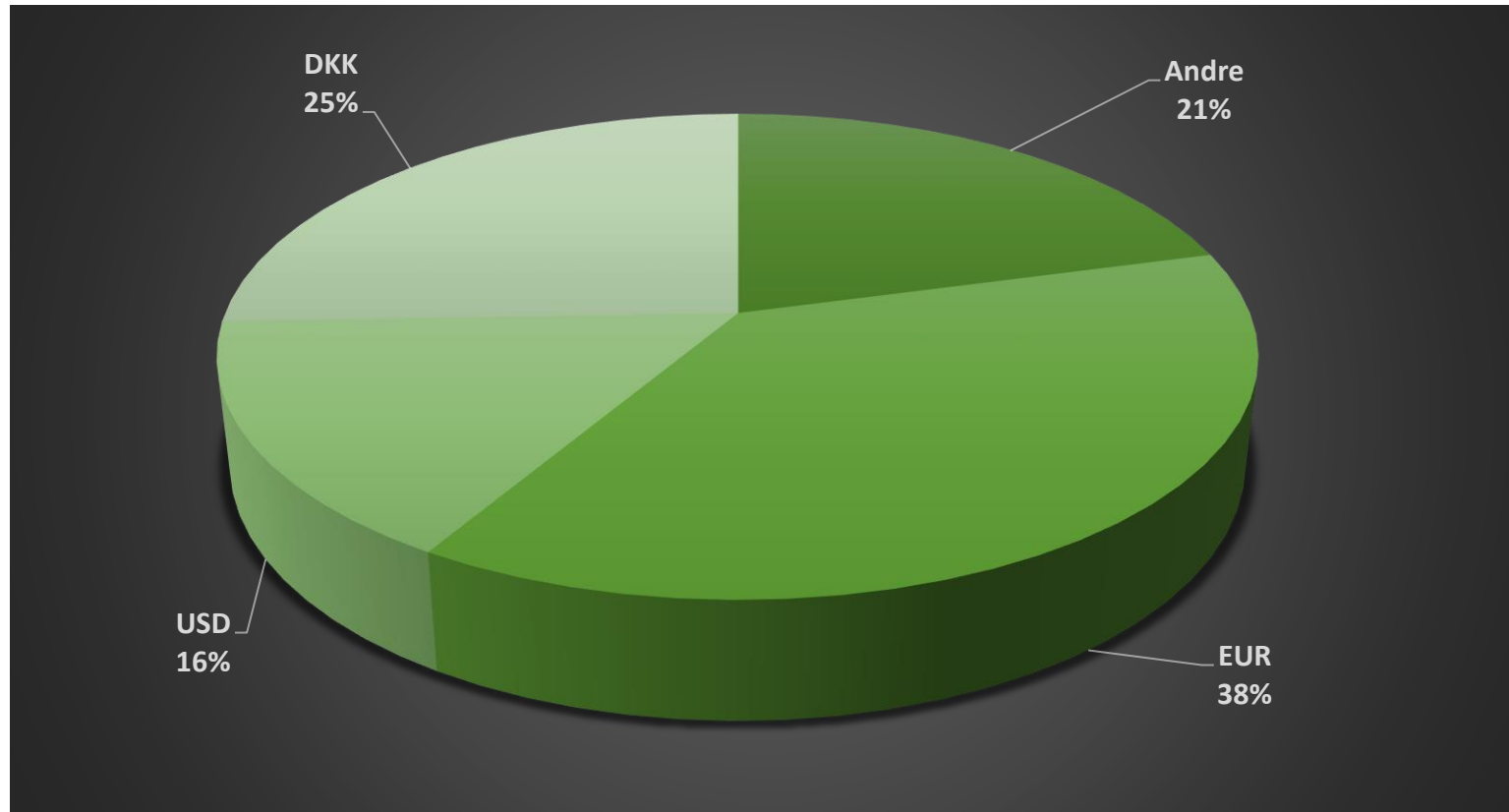


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Aktivfordelingen i din portefølje



Valutafordelingen i din portefølje



Din indkøbsliste

Navn	Ticker	ISIN	Fordeling
Investin Optimal Stabil		DK0060518710	35,0%
Investin Optimal Livscyklus 2030-40		DK0060518983	30,0%
iShares J. P. Morgan \$ EM Bond EUR Hedged UCITS ETF (EUR) IS3C	IS3C	IE00B9M6RS56	15,0%
iShares Listed Private Equity UCITS ETF (EUR) IQQL	IQQL	IE00B1TXHL60	5,0%
db x-trackers S&P Global Infrastructure UCITS ETF 1C (EUR) DX2E	DX2E	LU0322253229	5,0%
iShares MSCI Europe ESG Enhanced UCITS ETF EUR Acc EDM6	EDM6	IE00BHZPJ783	10,0%

Vi anbefaler at benytte Nordnet eller Saxo, når du handler ETF'ere.
Skriv Ticker eller ISIN i bankens søgefelt for at finde papir.



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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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