

ETF-baseret investeringsportefølje

Mellemlang tidshorisont, høj risiko.
69 % aktier, 30 % obligationer, 1 % ejendomme



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Forslag baseret på Kerne-Satellit strategien

Individuel:
Afkast/risiko tilpasning

Satellit-investering
EM aktier (ESG)
7 %

Satellit-investering
Private Equity
Robot-industri
20 %

Satellit-investering
EU aktier (ESG)
13 %

Sikkert fundament
(Aktiv porteføljepleje)

Kerne-investering = Optimal Invest 60 %

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



Dit individuelle porteføljeforslag

Navn	Aktivklasse	Fordeling
Investin Optimal Livscyklus 2040-50	Blandede (ETF'er)	30%
Investin Optimal Stabil	Blandede (ETF'er)	30%
iShares MSCI EM ESG Enhanced UCITS ETF USD Acc (EUR)	Aktier EM (ESG)	7%
iShares Listed Private Equity UCITS ETF (EUR)	Aktier (unoterede aktier)	10%
iShares MSCI EMU ESG Enhanced UCITS ETF EUR Acc	Aktier EU (ESG)	13%
iShares Automation & Robotics UCITS ETF USD (Dist) (EUR)	Aktier robotindustri	10%

Aktier = 59 %, Ejendom = 1 %, Private Equity = 10 % og Obligationer = 30 %



Omkostninger - porteføljeforslag

Navn	Investeringsstype	Fordeling	ÅOP	Total ÅOP
Investin Optimal Livscyklus 2040-50	Investeringsforening (aktier/obligationer)	30,0%	0,54%	0,16%
Investin Optimal Stabil	Investeringsforening (aktier/obligationer)	30,0%	0,61%	0,18%
iShares MSCI EM ESG Enhanced UCITS ETF USD Acc (EUR)	ETF	7,0%	0,18%	0,01%
iShares Listed Private Equity UCITS ETF (EUR)	ETF	10,0%	0,75%	0,08%
iShares MSCI EMU ESG Enhanced UCITS ETF EUR Acc	ETF	13,0%	0,12%	0,02%
iShares Automation & Robotics UCITS ETF USD (Dist) (EUR)	ETF	10,0%	0,40%	0,04%
Årlig løbende total omkostninger				0,49%

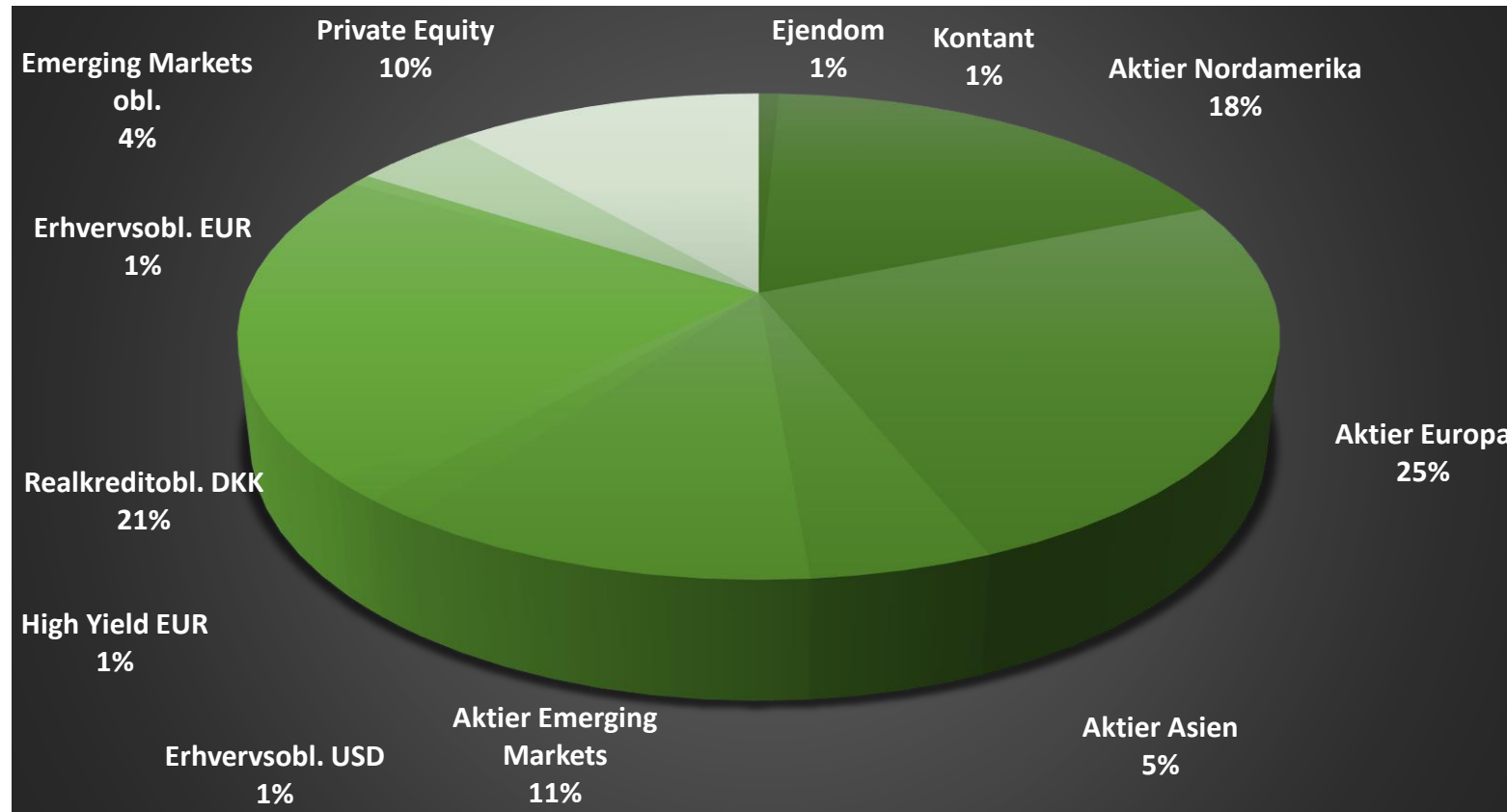


Årlige omkostninger ved traditionel Private Banking for velhavere = 1,5-2,5 %
(15.000 kr. til 25.000 kr. pr. 1 mio kr. formue)

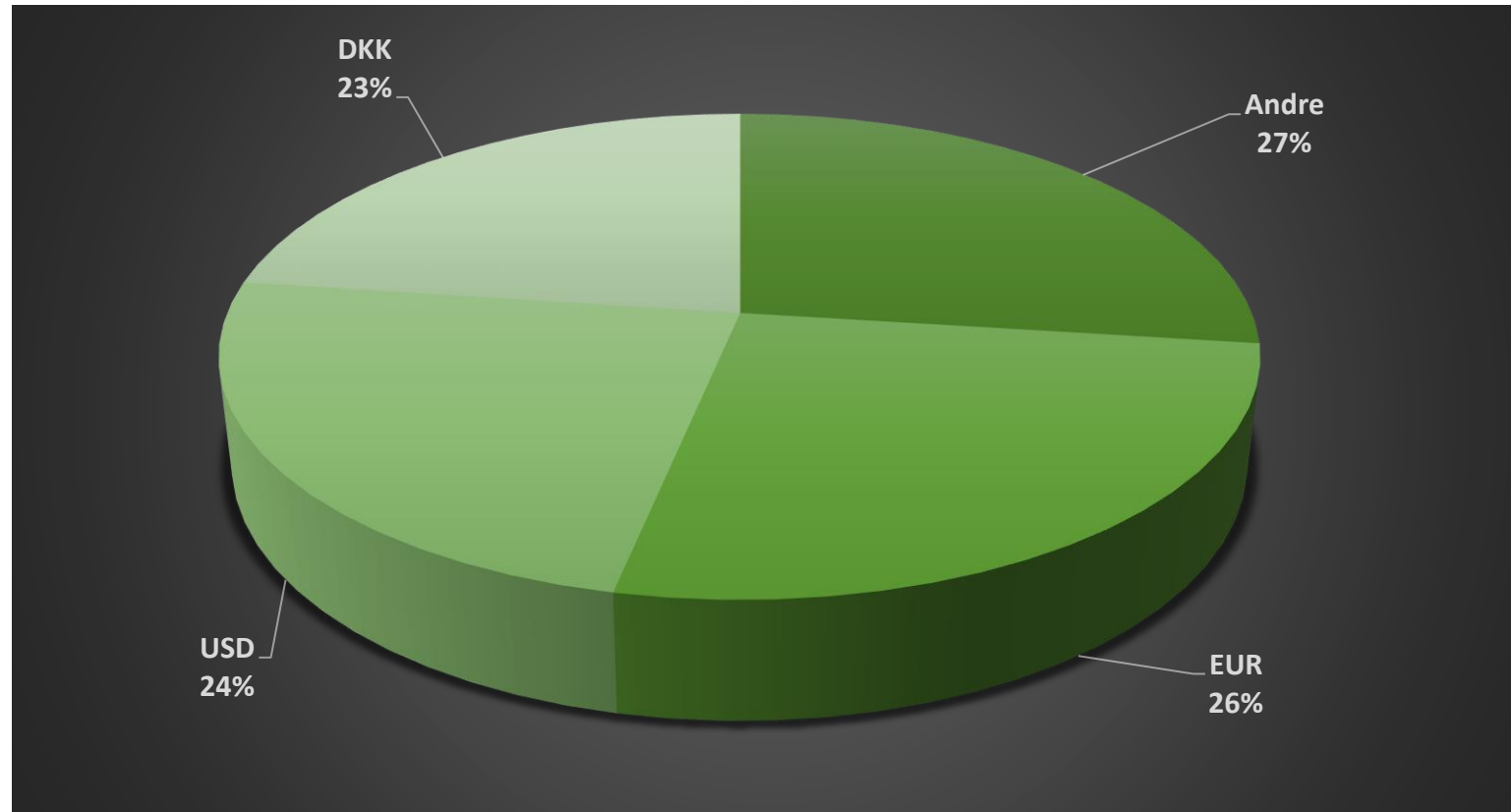
Årlige besparelse er ca. 15.000 kr. pr. 1 mio. kr. formue

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Aktivfordelingen i din portefølje



Valutafordelingen i din portefølje



Din indkøbsliste

Navn	Fondskode (ISIN)	Fordeling
Investin Optimal Livscyklus 2040-50	DK0060946192	30,0%
Investin Optimal Stabil	DK0060518710	30,0%
iShares MSCI EM ESG Enhanced UCITS ETF USD Acc (EUR) EDM2	IE00BHZPJ239	7,0%
iShares Listed Private Equity UCITS ETF (EUR) IQQL	IE00B1TXHL60	10,0%
iShares MSCI EMU ESG Enhanced UCITS ETF EUR Acc EDM4	IE00BHZPJ015	13,0%
iShares Automation & Robotics UCITS ETF USD (Dist) (EUR) 2B7F	IE00BYWZ0333	10,0%

Det er typisk billigst (gebyrer og kurtage) at benytte Nordnet eller Saxo Bank, når du handler ETF'ere.

Benyt de 4 bokstaver/tal efter ETF navn, når du søger det konkrete papir. Alternativt søg papiret via ISIN (fondskode).



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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

Past performance or achievements are not indicative of current or future performance. All investments are subject to market fluctuations and the risks inherent in investments in securities. The value of investments and the income they generate may increase as well as decrease and it is possible that investors will not recover their initial outlay.

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