

Project #2: Creating a Retirement Portfolio

	Fund #1	Fund #2	Fund #3
Vanguard Mutual Funds Selected	VSIGX – Vanguard Intermediate-Term Treasury Index Fund Admiral Shares	VITAX – Vanguard Information Technology Index Fund Admiral Shares	VHGEX – Vanguard Global Equity Fund
Index Fund or Actively Managed Fund?	Index Fund	Index Fund	Active
10-Year Average Rate of Return	1.16%	20.40%	8.78%
Expense Ratio	0.07%	0.10%	0.42%
% of Portfolio	10%	60%	30%
Estimated Portfolio Rate of Return	0.116%	12.24%	2.634%
Why did you select this fund?	<p>US Government Bond</p> <p>Lowers risk and provides portfolio stability.</p> <p>Hedge against market volatility.</p>	<p>High risk</p> <p>Capitalize on growth prospects in technology.</p> <p>Index fund diversifies across various tech sub-sectors.</p>	<p>High risk</p> <p>34.3% Foreign</p> <p>Diversify portfolio geographically.</p> <p>Includes investments across various sectors globally.</p>