

# Portfolio Recommendation

Generated December 04, 2025

## YOUR INVESTMENT PROFILE

Investment Goal	<b>Grow with caution</b>
Time Horizon	6-10 years
Risk Behavior	I'll do nothing
Investment Amount	<b>\$5,000.00</b>



## PORTFOLIO SUMMARY

Number of Holdings	7 ETFs
Equity Allocation	<b>65%</b>
Bond Allocation	35%
Expected Return	5-8%
Volatility	Medium

## YOUR PORTFOLIO HOLDINGS

#	ETF Name	Weight	Amount	Type
1	iShares Core MSCI World UCITS ETF (Acc)	30%	\$1,500	Core
2	Xtrackers II Global Aggregate Bond UCITS ETF 1C	35%	\$1,750	Core
3	iShares Core MSCI Emerging Markets IMI UCITS ETF	15%	\$750	Core
4	Xtrackers MSCI World Information Technology UCIT	5%	\$250	Thematic
5	iShares Global Healthcare UCITS ETF	5%	\$250	Thematic
6	iShares Global Clean Energy UCITS ETF (Acc)	5%	\$250	Thematic
7	Xtrackers MSCI World Industrials UCITS ETF 1C	5%	\$250	Core

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## HISTORICAL PERFORMANCE SCENARIOS

Based on your 65% equity / 35% bond split, historical data suggests:



### Key Metrics

Best Year	+21.7%
Average Return	+7.2%
Worst Year	-15.0%

## ALLOCATION TYPES

- █ Core Holdings - Stable, diversified base
- █ Thematic Holdings - Growth-focused sectors

## INVESTMENT THEMES COVERED

- |                       |                |                    |
|-----------------------|----------------|--------------------|
| > World (all regions) | > Asia-Pacific | > Emerging markets |
| > Latin America       | > Technology   | > Healthcare       |
| > Energy              | > Industrials  | > Nuclear Energy   |
| > Electric Vehicles   | > Biotech      | > Palladium        |

## GETTING STARTED

1. Open a brokerage account that offers UCITS ETFs
2. Transfer \$5,000 to your account
3. Purchase the ETFs with the allocations above
4. Set annual rebalancing reminder

### Estimated Annual Cost

Based on avg ETF expense ratios (~0.25%): \$12.50/year