

# Portfolio Recommendation

Generated December 04, 2025

## YOUR INVESTMENT PROFILE

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



## PORTFOLIO SUMMARY

Number of Holdings	7 ETFs
Equity Allocation	65%
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)
- > Latin America
- > Energy
- > Electric Vehicles
- > Asia-Pacific
- > Technology
- > Industrials
- > Biotech
- > Emerging markets
- > Healthcare
- > Nuclear Energy
- > Palladium

## GETTING STARTED

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

### Estimated Annual Cost

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