



FINANCIAL ADVICE

FOR WELLS FARGO

CLIENT

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BOJANA POPVIC	128 Client id	YEARS	3Y	2Y	1Y
		RETURNS	3.1	4	1.59
PAULA CEVALLOS	99 Client id	YEARS	3Y	2Y	1Y
		RETURNS	2.02	2.53	0.61

*Returns per unit of Risk

TWO WORST PERFORMING
PORTFOLIOS

ALEXANDRA CHARMAN	497 Client id	YEARS RETURNS	3Y 0.54	2Y 0.25	1Y -2.3
DANI GROSSMAN SHVED	29 Client id	YEARS RETURNS	3Y 0.28	2Y -0.55	1Y -4.71

*Returns per unit of Risk

Composition of Portfolios



Worst Performing Portfolios

	# of Assets	Portion
equity	18	27.27%
commodities	13	19.70%
alternatives	13	19.70%
Fixed Income	22	33.33%

-10.62% >

+16.47% <

Best Performing Portfolios



	# of Assets	Portion
equity	36	37.89%
commodities	21	22.11%
alternatives	21	22.11%
Fixed Income	16	16.84%

Key Findings Best Performing Portfolios

- High equity investments
- Low in Fixed Income investments

TICKER	RETURN 12	MAJOR ASSET CLASS	MINOR ASSET CLASS
MRO	1.2102	equity	large_cap
ENPH	0.9096	equity	large_cap
UCO	0.6907	commodities	precious_metals
UNG	0.5409	commodities	oil
ON	0.5044	equity	large_cap
USO	0.4369	commodities	oil
GSG	0.355	commodities	precious_metals

Key Findings Worst Performing Portfolios

- Low in equity investments
- High in Fixed Income investments

TICKER	RETURN 12	MAJOR ASSET CLASS	MINOR ASSET CLASS
KOLD	-0.9310	commodities	oil
THCX	-0.7367	commodities	cannabis
SCO	-0.6988	commodities	oil
POTX	-0.6815	commodities	cannabis
CNBS	-0.6232	commodities	cannabis
MSOS	-0.5827	commodities	cannabis

RECOMMENDATIONS ON WORST PERFORMING PORTFOLIOS

Portfolio for Client_id = 497

SELL

KOLD
SCO
POTX
CNBS
MSOS

BUY

MRO
ENPH
ON

Portfolio for Client_id = 29

SELL

THCX
CNBS

BUY

MRO
ENPH
ON

THANK YOU!

HULT INTERNATIONAL BUSINESS SCHOOL

BUSINESS CHALLENGE #1 MBAN DD

TEAM 8