

Glossary

- **Investment Objectives:** An investment objective is a set of goals an investor has for their portfolio. For example, this could be to generate 10% p.a. over the next 5 years.
- **Risk Appetite:** Risk appetite is the amount of risk an organization or an individual is willing to take in pursuit of investment objectives. For example, a risk-taking individual is willing to take higher risks to achieve returns and will be regarded as someone having a higher risk appetite.
- **Regulatory Investment Restrictions:** A regulatory investment restriction is imposed by the law or by the governing bodies (such as U.S. Securities and Exchange Commission, FCA, etc.) on undertaking specific investment decisions or actions.
- **Voluntary Investment Restrictions:** A voluntary investment restriction is self-imposed on undertaking specific investment decisions or actions (such as voluntary deciding not to invest in firearm producing companies).