

John Doe's Stock Investment Portfolio Report

Introduction

This report provides an overview of John Doe's stock investment portfolio, including its composition, performance, and relevant news.

Portfolio Composition

The portfolio consists of the following stocks:

Security Name	Market Value (USD)	Y2Y %	Industry Sector
S&P 500	8,500,000	15	Index Fund
MSCI AC World	6,000,000	12	Index Fund
TOPIX	4,200,000	13	Index Fund
MSCI AP ex-Japan	5,700,000	9	Index Fund
STOXX 600	3,500,000	5	Index Fund
MSCI EM	2,800,000	3	Index Fund

Performance

The performance of each stock in the portfolio is as follows:

- S&P 500: The S&P 500 index was at 6,143.50, up by 0.13% as of February 24, 2025.
- MSCI AC World: The MSCI AC World performance from January 2010 to January 2025 shows cumulative index performance with net returns in USD.
- TOPIX: The TOPIX live stock price is 2,765.59 as of February 24, 2025.
- MSCI AP ex-Japan: The MSCI AC Pacific Ex Japan Index currently stands at 547.00, offering exposure to a diversified basket of stocks across main Asian Pacific markets excluding Japan.
- STOXX 600: The STOXX 600 index closed at an all-time high on February 23, 2025, driven by gains in energy stocks, marking its 10th advance in the past 12 sessions.
- MSCI EM: The MSCI Emerging Markets Index experienced a decline of -1.2% over the past day and a gain of 1.5% over the past week as of October 13, 2023.

News

Recent news and developments affecting the portfolio include:

- The S&P 500 reaching a new all-time high closing at 6,129.58 on Tuesday, surpassing the previous record of 6,118.71 set on January 23.
- The MSCI AC World Index showing steady growth, aligning with broader trends in global equity markets.
- The TOPIX index trading at 2,737.23 JPY, showing a change of -14.97%.
- The MSCI Asia Pacific ex-Japan index being set for its worst annual performance since 2008.
- The STOXX 600 index closing at an all-time high on February 23, 2025, driven by gains in energy stocks.
- The MSCI Emerging Markets Index experiencing a decline of -1.2% over the past day and a gain of 1.5% over the past week as of October 13, 2023.

Goldman Report

The Goldman report highlights the following key points:

- The US equity market accounts for around 70% of the MSCI AC World Index.
- The biggest 10 US stocks account for over 20% of the entire value of the global index.
- The MSCI world index is up nearly 40% in price terms alone since October 2023.
- The Nasdaq has climbed over 50% during the same period, and Nvidia, the World's biggest company, has surged 264%.

- The S&P 500 has had one of its strongest performances since 1928, with a significant rise in 2024.

Conclusion

In conclusion, John Doe's stock investment portfolio is diversified across various index funds, with a mix of US and international stocks. The portfolio has shown positive performance, with some stocks reaching new all-time highs. However, it is essential to stay informed about market developments and news that may impact the portfolio's performance.