

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 security in the portfolio is as follows:

- S&P 500: up by 0.13% as of February 14, 2025
- MSCI AC World: shown a 1.70% performance over the past five days and a 3% increase over the past month
- TOPIX: experienced a potential trend shift as Japan's economy continues to recover from the Delta outbreak
- MSCI AP ex-Japan: set for its worst annual performance since 2008
- STOXX 600: closed at a record high, logging its 10th advance in the past 12 sessions
- MSCI EM: delivered a total return of 14.54% over the past 12 months and is up 6.19% year-to-date

News

Recent news and developments affecting the portfolio include:

- Inflation fears and tariff concerns in the US
- Improving equity risk appetite and optimism around AI
- Potential slowing of US wage growth
- Record-breaking inflows into China-focused ETFs
- Changes in the TOPIX index's calculation methodology

Goldman Report

The Goldman report highlights the dominance of the US equity market in the global landscape, with the US accounting for around 70% of the MSCI AC World Index. The report also notes the significant concentration of market value in the US, with the biggest 10 US stocks accounting for over 20% of the entire value of the global index.

Conclusion

In conclusion, John Doe's stock investment portfolio is diversified across various index funds, with a mix of developed and emerging markets. The portfolio has shown positive performance in recent times, with some securities experiencing record highs. However, it is essential to monitor the portfolio closely and adjust as needed to ensure alignment with John Doe's investment goals and risk tolerance.