

## **INVESTMENT PORTFOLIO ANALYSIS**

AN INVESTMENT PORTFOLIO IS A GROUP OF INVESTMENTS HELD TOGETHER AS A UNIT.

ASSETS ARE INVESTMENTS HELD BY AN INVESTMENT PORTFOLIO.

### **Portfolios for Different Objectives**

#### **Investments for Retirement Income**

Investments for retirement income require relatively conservative risk exposures and low volatility investments. These investments may include bonds, money market funds, and other low-risk investments designed to ensure capital preservation.

#### **Risk Management**

Investments for risk management are typically held in a diversified portfolio of stocks and bonds. The goal of these investments is to provide a minimum level of return while minimizing risk. These investments may include stocks, bonds, and other assets designed to provide a steady stream of income and capital appreciation.

The type of investment strategy you choose will depend on your personal financial situation and goals. These investments may include stocks, bonds, and other assets designed to provide a steady stream of income and capital appreciation.

#### **Investment Returns**

Investment returns are the percentage increase or decrease in the value of an investment over time. These returns can be expressed as a percentage or as a rate of return.

#### **Investment Risks**

Investment risks are the potential losses that can occur when an investment does not perform as expected. These risks can be expressed as a percentage or as a rate of return.

