

Ex-Post Reviews - Optimise - Optimise Portfolios

Last Modified on 13/02/2024 3:35 pm GMT

Optimise Portfolio

- Review funds and current weightings to determine whether the portfolio should be updated.
- Add and remove funds
- Change weightings
- Rebalance
- Select an alternative portfolio
- Select Growth Rate for Next Period and Remainder of Term Forecasts

Add/Edit funds within the portfolio, change the portfolio, rebalance and find weightings

The screenshot displays the 'Next Period Optimisation' interface. It features a navigation bar with tabs for 'Investment Details', 'Contributions & Withdrawals', 'Costs & Charges', 'Optimise Portfolio', and 'Assets Under Management'. The main content area is divided into several sections:

- What's Shown Here:** A text box explaining the purpose of the review.
- Rebalance:** A button and text box explaining the rebalancing action.
- Find Weightings:** A button and text box explaining the weighting action.
- Select Portfolio:** A button and text box explaining the portfolio selection action.
- Fund Search:** A search box with filters for 'Whole of Market', 'Parent Only', and 'Generic Funds'.
- Fund Table:** A table listing funds with columns for Code, Shareclass Lock, Name, Promoter, Asset Allocation, and Weighting %.
- Portfolio Summary:** A summary box showing the Risk Profile Category (Moderately Cautious), Risk Rating (2), and gain forecasts.

Code	Shareclass Lock	Name	Promoter	Asset Allocation	Weighting %
ACDQ	🔒	Vanguard LifeStrategy 60% Equity A Shares Acc	Vanguard Investments UK Limite	🟡	29.94
ACDY	🔒	Vanguard LifeStrategy 100% Equity A Shares Acc	Vanguard Investments UK Limite	🟡	13.59
RSYS	🔒	Vanguard LifeStrategy 20% Equity UCITS ETF Dis	Vanguard Group (Ireland) Limit	🟢	56.47

Portfolio Summary:
Risk Profile Category: Moderately Cautious
Risk Rating: 2
Minimum Gain in any 1 Year: **-12.38% or -£1,238.00**
Average Gain in any 1 Year: **6.3% or £630.00**
Maximum Gain in any 1 Year: **25.6% or £2,560.00**