Portfolio Clinic

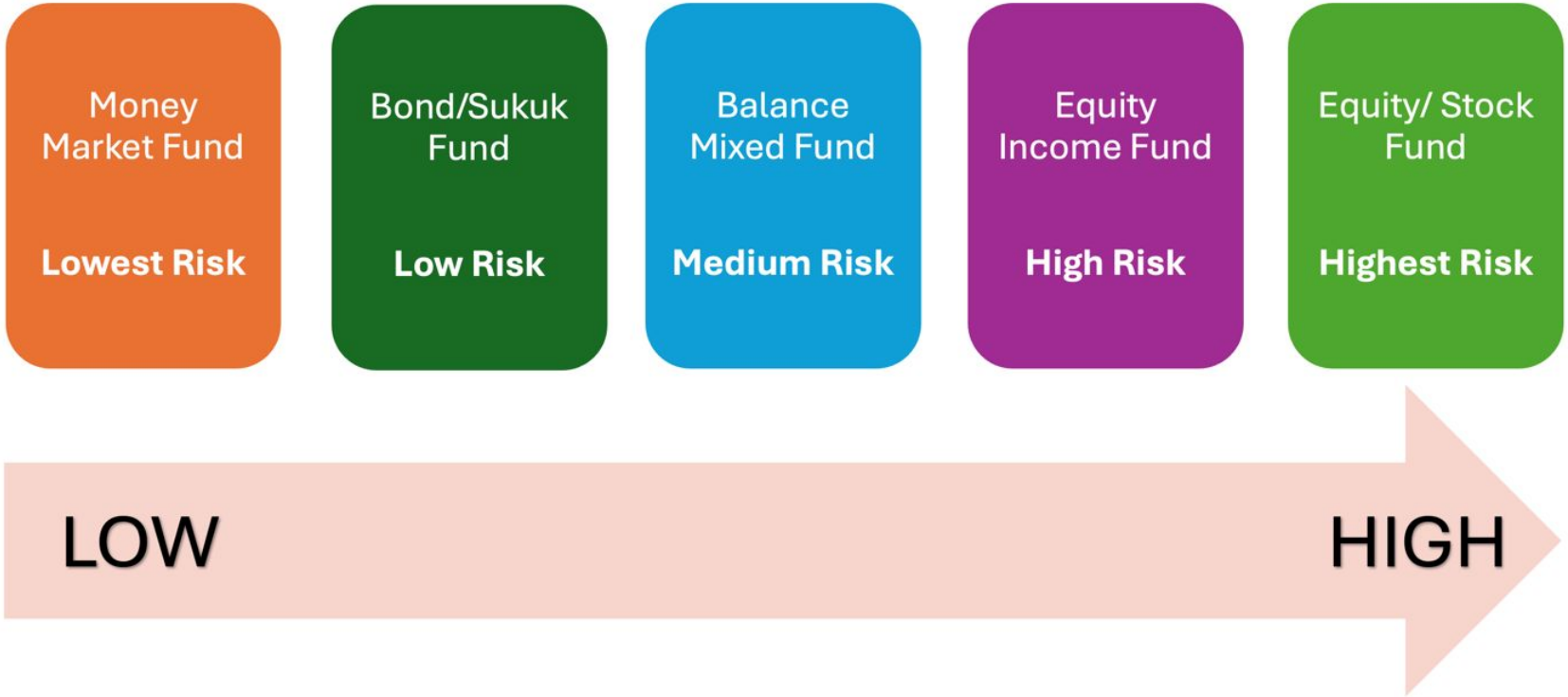
From Mandate to Allocation

Unit Trust Fund Categories

Money Market Fund	Bond/Sukuk Fund	Balance Mixed Fund	Equity Income Fund	Equity/Stock Fund
Lowest Risk	Low Risk	Medium Risk	High Risk	Highest Risk
Deposit placement in Bank	Corporate Borrowing	Mixture of Bond & Equities allocation	Invest Blue Chips stock with Dividend Income	Stock Investment with capital gain In focus

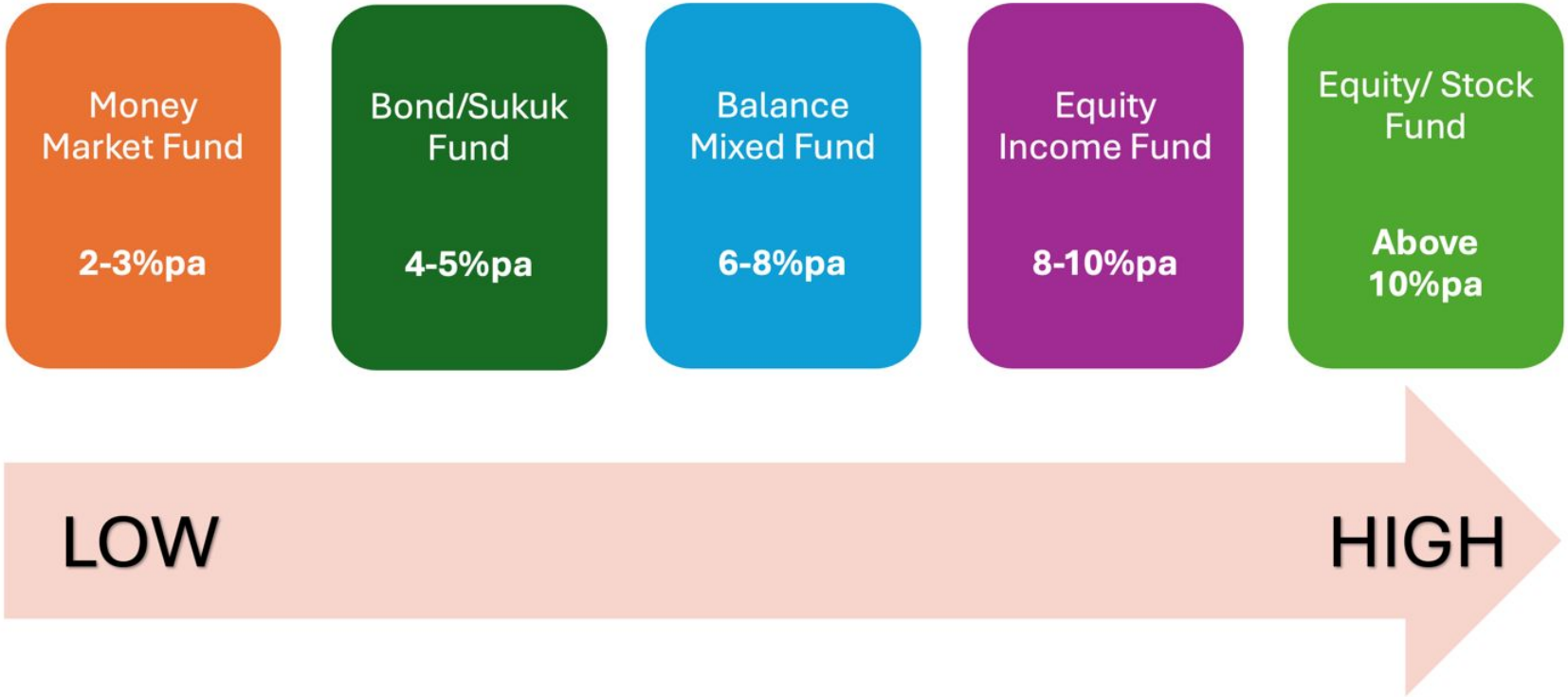
INTERNAL

Unit Trust Fund Risk



INTERNAL

Unit Trust Fund Expected Return



INTERNAL

Unit Trust Fund Duration

Money Market Fund	Bond/Sukuk Fund	Balance Mixed Fund	Equity Income Fund	Equity/ Stock Fund
Short Term	**Short Term**	**Mid Term**	**Mid-Long**	**Long Term**
< 12mths	**<36mths>**	**<60mths>**	**<120mths>**	**>120mths**



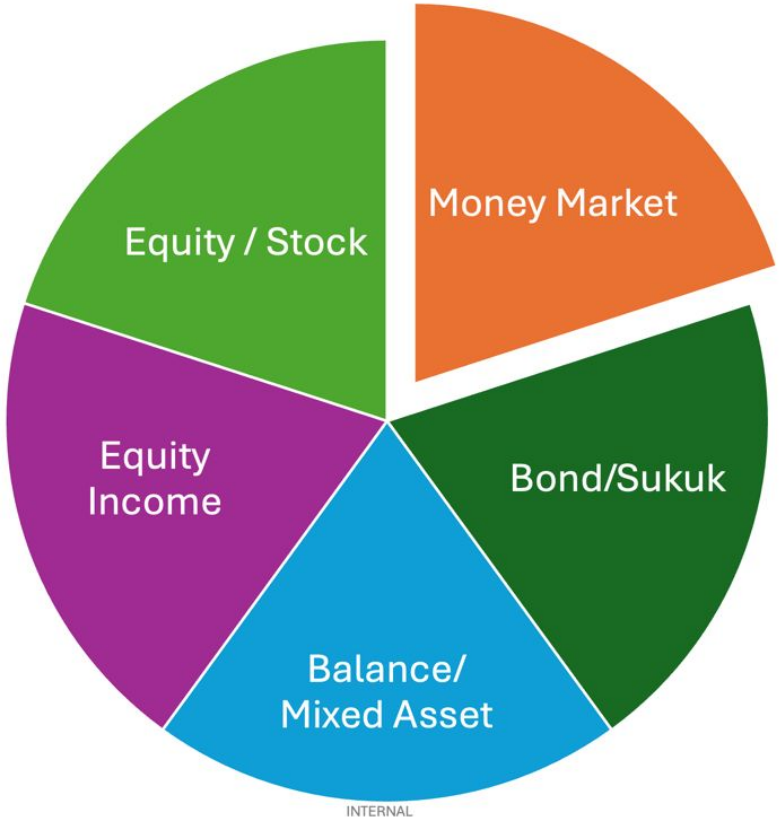
INTERNAL

Unit Trust Fund Country Allocation



INTERNAL

Unit Trust Fund Portfolio Allocation



INTERNAL

Unit Trust Fund Portfolio Allocation

Consideration:-

- **Duration**
- **Risk**
- **Expected Return**
- **Macroeconomics (Tactical)**

INTERNAL

NEXT ACTION

Finalise. Observe. Reflect.

9 NOV
FINALISE PORTFOLIO

7 DEC
OBSERVE THROUGH

8 DEC
REFLECT BY NOON MYT

Reflection opens after final NAVs are ready. Watch for the organiser's email.

4–8 funds / 5–30% each / total 100% / approved MYR classes

Three RM150 awards: best for Aina / best for Ravi / highest mandate-compliant return.

RM100K Portfolio Challenge

Brief + submission access: playmoneymatters.my/taylors

GET PORTFOLIO ADVICE

Whatsapp
@KennyInvests

Programme hub:
PlayMoneyMatters.my/Taylors