eToro Popular Investor

JamieMarc

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Portfolio Factsheet – June 2022

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Objectives and Investment Strategy

Objectives

The portfolio aims to provide long term capital growth.
Return: Outperform the S&P 500 over the long term*
Risk: Maintain an eToro Risk Score[1] of less than or equal to 5

Current eToro Risk Score[1]: 5

Investment Policy

The portfolio will only invest in stocks and ETFs.
This is a long-only portfolio and leverage will not be used.

The portfolio will be relatively concentrated, holding approximately 20-30 stocks at any one time. No more than 10% will be invested in a single stock, ensuring the portfolio does not become too concentrated.

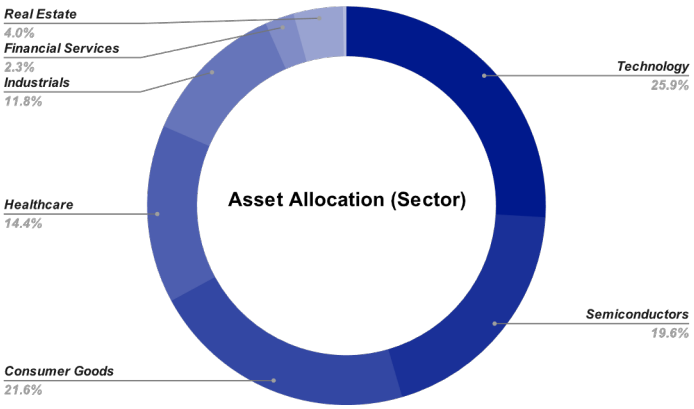
Investment Strategy

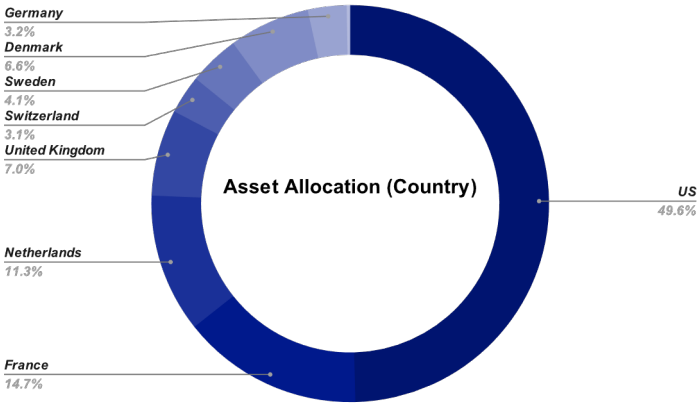
Investments will focus predominantly on long-term trends in technology and strong consumer brands.
A small proportion of the portfolio may also be invested in thematic equities, such as renewable energy or other industries to provide some diversification.

Stock selection will favour **high quality, ESG-friendly** companies with a significant competitive advantage and with the potential to grow their revenues and earnings over many years.

These companies will have the ability to maintain high margins and earn sustainably high returns on their capital, reinvesting their profits to compound their returns over time.

Asset Allocation





Portfolio Performance

Time Period	JamieMarc	S&P 500
June 2022	-8.04%	-8.39%
May 2022	-2.42%	0.01%
April 2022	-12.30%	-8.80%
March 2022	3.26%	3.58%
February 2022	-2.11%	-3.14%
January 2022	-9.45%	-5.26%
December 2021	-1.83%	4.36%
November 2021	2.82%	-0.83%
October 2021	8.90%	6.91%
September 2021	-4.25%	-4.76%
August 2021	4.94%	2.90%
July 2021	4.63%	2.27%
June 2021	4.15%	2.22%
May 2021	2.06%	0.55%

Top 10 Investments

Stock	Weight (%)
Diageo Plc	7.0%
Fortinet Inc	7.0%
Novo Nordisk A/S	6.6%
Microsoft Corporation	6.4%
Hermes International SCA	6.1%
Alphabet Inc	6.0%
NVIDIA Corporation	4.8%
IMCD NV	4.5%
Sartorius Stedim Biotech SA	4.4%
Lvmh Moet Hennessy Vuitton SE	4.2%
Total	**57.1%**

Copier Information

✅ If you wish to copy the portfolio, tick "copy open trades"

[1] Link to an explanation of eToro's Risk Score and how it is calculated: https://www.etoro.com/news-and-analysis/etoro-updates/risk-score-calculation/

* **Disclaimer:** Copiers should be aware that there is no guarantee that this objective will be achieved and your capital is at risk. This factsheet does not provide financial advice and is not a recommendation to buy, sell or copy any investments. Past performance is not indicative of future returns.