eToro Popular Investor

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Portfolio Factsheet – December 2023

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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]: 4

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.

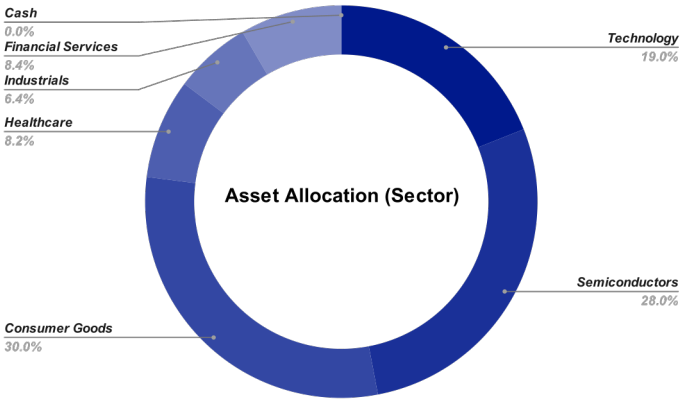
Investment Strategy

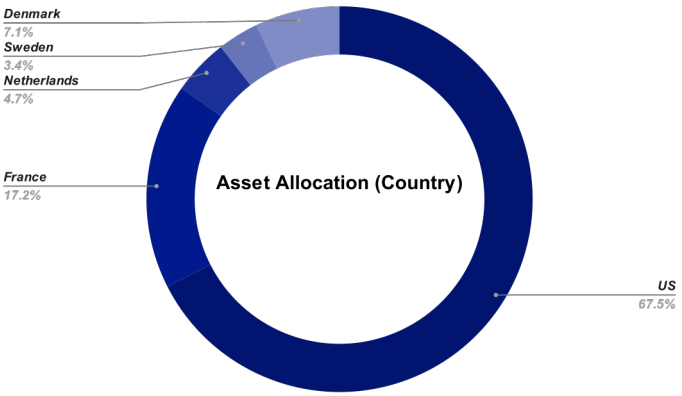
Investments will focus predominantly on long-term trends in technology and strong consumer brands.
A small proportion of the portfolio may also be invested in thematic equities, such as renewable energy or other industries to provide some diversification.

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

	2023		2022		2021	
Month	Jamie Marc	S&P 500	Jamie Marc	S&P 500	Jamie Marc	S&P 500
Dec	3.13%	4.42%	-6.09%	-5.90%	-1.83%	4.36%
Nov	9.93%	8.92%	8.36%	5.38%	2.82%	-0.83%
Oct	-1.83%	-2.20%	2.69%	7.99%	8.90%	6.91%
Sep	-6.36%	-4.87%	-8.64%	-9.34%	-4.25%	-4.76%
Aug	-2.28%	-1.77%	-7.57%	-4.24%	4.94%	2.90%
Jul	1.78%	3.11%	15.55%	9.11%	4.63%	2.27%
Jun	3.66%	6.47%	-8.04%	-8.39%	4.15%	2.22%
May	3.37%	0.25%	-2.42%	0.01%	2.06%	0.55%
Apr	-1.10%	1.46%	-12.30%	-8.80%	-	-
Mar	8.69%	3.51%	3.26%	3.58%	-	-
Feb	0.65%	-2.61%	-2.11%	-3.14%	-	-
Jan	9.61%	6.18%	-9.45%	-5.26%	-	-

Top 10 Investments

Stock	Weight (%)
Nvidia Corporation	12.2%
Microsoft Corporation	8.3%
Hermes International SCA	7.5%
Novo Nordisk A/S	7.1%
Cadence Design Systems Inc	6.5%
McDonald's Corp	5.8%
Motorola Solutions Inc	5.4%
Fortinet Inc	5.4%
PepsiCo, Inc	5.2%
ASM International NV	4.7%
Total	**68.0 %**

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.