

Portfolio Review Framework

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Research-led process. No guaranteed returns. Not an RIA unless separately registered.

Five-step research process

1. Understand goals and constraints
2. Review portfolio and holdings
3. Assess risk and asset allocation
4. Research-led recommendations
5. Review, implement and monitor

Framework pillars

Risk profiling and goal mapping

Asset allocation review

Holdings and overlap analysis

Risk-adjusted performance

Tax, cost and liquidity

Written review and discipline

What we review

Asset allocation, fund overlap, sector exposure, rolling returns, CAGR and XIRR, Sharpe and Sortino, drawdown, tax impact, exit load, expense ratio, insurance adequacy, emergency fund, goal alignment.

Disclaimer

Investments in securities market are subject to market risks.

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