## Portfolio performance

| Portfolio | Initial <br> investment <br> (\$) | Current <br> portfolio value <br> (\$) | Net total <br> return <br> $\mathbf{( \% )}$ | Benchmark <br> return <br> (\%) | Dividends <br> and coupons <br> (\$) | Realised <br> profit/loss <br> (\$) | Unrealised <br> profit/loss <br> (\$) |
| :--- | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Ms Shona Chee | 40,000 | $40,730.27$ | 1.83 | 5.40 | 77.02 | 139.96 | $1,059.30$ |
| Mr Getty Goh | 200,000 | $206,104.50$ | 3.05 | 5.42 | 253.51 | $1,170.81$ | $5,345.44$ |
| Mr Wang Moo Kee | 400,000 | $413,889.51$ | 3.47 | 5.33 | $1,878.78$ | $2,225.00$ | $11,974.87$ |

## HOW THEY COMPARE

## Ms Shona Chee

Bonds 34\%

## Mr Getty Goh



Mr Wang Moo Kee


NOTE:

- Portfolio start date was Jan 18, 2016.
- Portfolio performance as at March 31, 2016.
- As the Portfolio Series is intended for illustrative and educational purposes only, it will not involve actual money, investments or solicitation of funds for actual fund management by CFAS or the advisory panel.
- You are advised to seek independent financial or other professional advice for your own investments.
- CFAS and the advisory panel may provide information and recommendations on investments which they have an interest in.
- All views or recommendations made by the advisory panel are to be attributed to CFAS.

