Portfolio performance (as at May 31, 2017)

Portfolio	Investment as at Jan 31, 2017 ($)	Current portfolio value ($)	Net total return (%)	Benchmark return (%)	Dividends and coupons ($)	Realised P/L ($)	Unrealised P/L ($)
Ms Shona Chee	63,732	66,211.75	3.89	5.17	567.89	391.50	4,090.70
Mr Getty Goh	222,193	235,402.47	5.94	6.07	1,677.27	4,688.22	20,090
Mr Wang Moo Kee	437,248	453,664.88	3.75	4.60	5,825.21	2,260.51	20,165.32

*New fiscal year begins from Jan 31, 2017

What are in the simulated portfolios?

	Ms Shona Chee	Mr Getty Goh	Mr Wang Moo Kee
Initial investment amount	$60,000	$200,000	$400,000
Portfolio value	$66,211.75	$235,402.47	$453,664.88
Asset class	**Security (Weightage)**	**Security (Weightage)**	**Security (Weightage)**
Cash	**0.3%**	**0.1%**	**0.1%**
Domestic equities	**30.8%** -DBS -First Resources -OCBC -Singapore Exchange -Singtel -Venture Corp -Wing Tai	**37.6%** -DBS -First Resources -OCBC -Singapore Exchange -Singtel -ThaiBev -Venture Corp -Wing Tai	**30.3%** -DBS -First Resources -OCBC -Singapore Exchange -Singtel -ThaiBev -Venture Corp -Wing Tai
Global ETFs	**26%** -DBX AC ASIA EX Japan 1C -DBX EURO STOXX 50 -DBX MSCI USA 1C -ISHARES MSCI India Index ETF -SPDR Gold shares	**44.6%** -DBX FTSE China 50 1C -DBX AC Asia ex-Japan 1C -DBX EURO STOXX 50 -DBX MSCI Japan 1C -DBX MSCI USA 1C -ISHARES MSCI India Index ETF -SPDR Gold shares	**19.7%** -DBX EURO STOXX 50 -DBX MSCI USA 1C -ISHARES MSCI India Index ETF -SPDR Gold shares
Reits	**10.2%** -A-Reit -Keppel DC Reit	**9.2%** -A-Reit -Keppel DC Reit	**5%** -A-Reit -Keppel DC Reit
Bonds	**32.7%** -CMT 3.08% Feb 21 -FCL 3.65% May 22 -ISHARES JPM USD Asia Bond -Singapore Savings bond	**8.4%** -CMT 3.08% Feb 21 -ISHARES JPM USD Asia Bond -Singapore Savings bond	**44.9%** -ABF Singapore Bond Index Fund -CMT 3.08% Feb 21 -DBS 4.7% Perp (call Nov 20) -FCL 3.65% May 22 -ISHARES JPM USD Asia Bond -OCBC 5.1% Perp (call Sept 18) -Singapore Savings bond

NOTES:
- Portfolio start date was Jan 18, 2016.
- Portfolio performance as at May 31, 2017.
- Ms Chee's investment amount grew to $60,000 from $40,000 as she added $20,000 savings to the simulated portfolio.
- 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.
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Source: CFAS SUNDAY TIMES GRAPHICS