

INVESTMENT OBJECTIVE

The Core Equity100 portfolio aims to capture the full growth potential of global equities and deliver long-term capital appreciation by investing in a diversified portfolio of equity ETFs. It is built using a Smart Beta investment strategy, applying factor tilts across size, value, quality, and emerging markets to maximise risk-adjusted returns over the long run. It is designed for investors with a high risk tolerance and a long investment horizon of 10 years or more who seek maximum equity exposure without fixed income diversification.

MONTH IN REVIEW

Core Equity100 gained +2.13%, led by US large caps and developed markets outside the US after strong chip earnings eased fears the AI trade had run ahead of itself. China dragged as internet-sector results failed to impress investors.

RETURNS

Avg. Annualised Return (8 years)

10.11 % p.a.

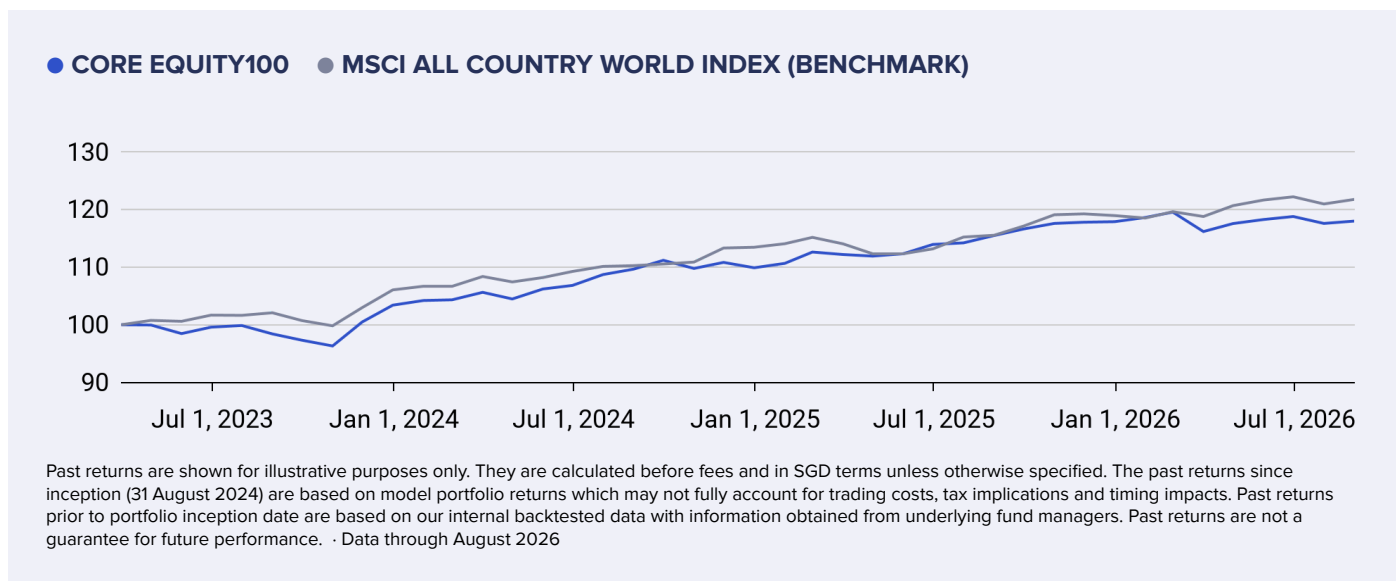
Risk Rating

● ● ● ● ● 4 / 5 • Moderate High

KEY FACTS

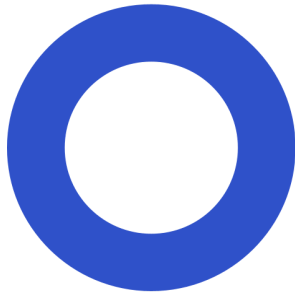
Asset Class	Equity	Recommended Horizon	10+ years
Benchmark	MSCI ACWI	Inception Date	31 March 2021

PERFORMANCE AGAINST BENCHMARK (GROSS RETURNS)



	ANNUALISED (%)				
	YTD	1Y	3Y	5Y	8Y
● CORE E100	11.30%	17.58%	15.65%	7.94%	10.11%
● BENCHMARK	12.60%	20.65%	17.90%	9.55%	11.05%

ASSET CLASS

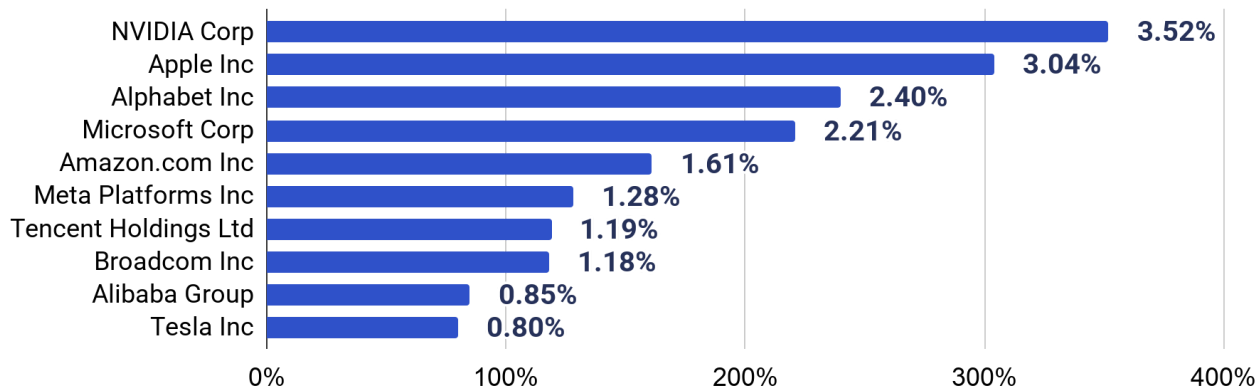


● Equities 100%

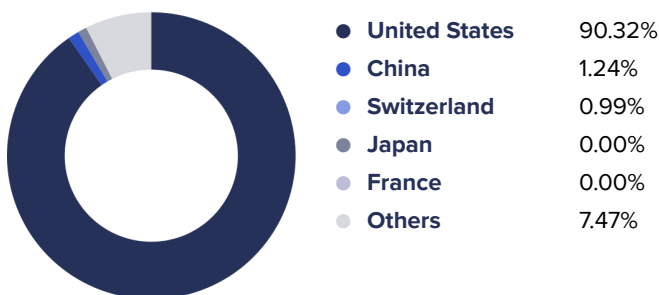
ETF COMPOSITION (%)

CSPX	iShares Core S&P 500 UCITS ETF	25.10%
EFA	iShares MSCI EAFE ETF	21.55%
XDEW	Xtrackers S&P 500 Equal Weight UCITS ETF	15.12%
DUHP	Dimensional US High Profitability ETF	9.97%
QQQ	Invesco QQQ Trust Series1	9.79%
ICHN	iShares MSCI China UCITS ETF	6.22%
EIMI	iShares Core MSCI EM IMI UCITS ETF	5.18%
DFAT	Dimensional US Targeted Value ETF	5.12%
KWEB LN	KraneShares CSI China Internet ETF	1.95%
AGGU	iShares Core Global Aggregate Bond UCITS ETF	0.00%

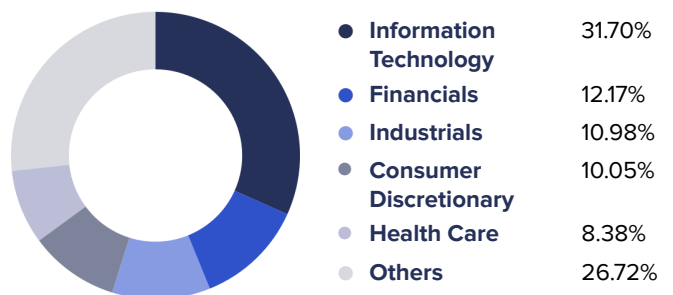
TOP 10 HOLDINGS | WEIGHTAGE (%)



COUNTRIES (%)



SECTORS (%)



For guidance on fund allocation, please contact our advisory team at advisory@syfe.com. Sharpe ratio and Standard Deviation measured from April 2013.

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