

# SUMMARY OF TERMS

## ETORO PORTFOLIO

Inception	4 <sup>th</sup> January 2021
Denomination/Benchmark	USD
Custody	Self-custodial (investor retains full custody of their assets)
Investor Profile	Aggressive
Target Return	20% per annum
Suggested minimum investment time frame	3 years
Minimum Investment	US \$200
Investment Management	Actively managed by the Popular Investor

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## Definition of Aggressive Investor

An aggressive risk investor is characterized by their willingness to take substantial risks in pursuit of potentially very high investment returns. Here is a detailed description of an aggressive risk investor:

### Investment Goals:

The primary goal of an aggressive risk investor is to achieve rapid capital appreciation and generate substantial returns on their investments. They aim to outperform the market and are willing to accept a higher level of risk in order to maximize their potential gains. They often prioritize aggressive growth and seek investments with significant upside potential.

### Risk Tolerance:

Aggressive risk investors generally have a high-risk tolerance. They are comfortable with the possibility of experiencing substantial volatility and losses in their investment portfolio. They understand that with the potential for higher returns comes a higher likelihood of significant market fluctuations. These investors are mentally prepared to endure short-term losses with the expectation that their investments will recover and grow over the long term.

### Investment Horizon:

Aggressive risk investors typically have a long-term investment horizon, usually spanning 10 years or more. They understand that higher-risk investments may require a longer time frame to weather market turbulence and potentially deliver the desired returns. By adopting a long-term perspective, they believe they can ride out short-term market downturns and realize the potential growth of their investments.

### Other Relevant Information:

1. **Concentrated Positions:** Aggressive risk investors may be more inclined to concentrate their investments in a smaller number of high-potential assets. By focusing their resources on a select few opportunities, they aim to leverage their investment expertise and potentially achieve outsized returns. However, this strategy also exposes them to higher concentration risk, as the performance of their portfolio may be heavily influenced by the performance of a few investments.
2. **Active Investment Management:** Aggressive risk investors often actively manage their investment portfolios. They continuously analyze market trends and actively seek out investment opportunities that offer high growth potential. This approach might involve regular portfolio rebalancing, adjusting investments according to market conditions, and closely monitoring individual holdings to exploit emerging opportunities.
3. **Venture Capital and Private Equity:** Aggressive risk investors may actively seek exposure to venture capital and private equity investments. These asset classes offer the potential for significant returns but come with both higher volatility and liquidity risks. By investing in startups, early-stage companies, or private equity funds, aggressive risk investors aim to capture early growth and participate in high-potential investment opportunities.
4. **High Allocation to Growth Stocks:** Aggressive risk investors often allocate a significant portion of their portfolio to growth stocks. They look for companies with strong growth prospects, even if they trade at higher valuations. These investors may prioritize

innovative industries and emerging sectors, aiming to capture the rapid expansion of companies in such areas.

5. Comfort with Market Volatility: Aggressive risk investors are psychologically prepared to weather major market fluctuations. They understand that short-term volatility is inherent in aggressive investment strategies and are willing to tolerate the ups and downs of the market in pursuit of long-term gains.

It's important to note that aggressive risk investing carries a higher level of risk, which can result in significant losses. Therefore, it is crucial for aggressive risk investors to thoroughly understand their risk tolerance, conduct extensive research, and seek professional advice from financial advisors when making investment decisions.