

Mr & Mrs Sample

Insight 360° Second Look Review



Performance **B+**

Score: 27/35
CRITERIA: PERFORMANCE
VS INDUSTRY

Risk Ratio **B+**

Score: 29/35
CRITERIA: RISK VS TIME
HORIZON

Fees **C+**

Score: 19/30
CRITERIA: COST VS
INDUSTRY

Detailed Findings

Performance

Since inception, the portfolio has averaged roughly 10% per year. When compared to similar investments, it has consistently landed in the second quartile (top 25–50% of its peer group).

Risk Ratio

Your portfolio follows a suitable asset allocation of 70% equity, 30% fixed income, capturing about 85% of market gains and 90% of market losses. This means your portfolio is trading a bit of upside for slightly better downside protection.

Fees

Your all-in cost averages to approximately 2%, which is above our average based on your portfolio size of \$1,000,000. Your current investment management fees can be estimated to be approximately \$20,000.

OVERALL

75
B

Good Standing

The portfolio is performing reasonably well but is dragged down by higher-than-average fees.