Insurance and Pension Commitments (Finance and Investment)

Description

You are a mutual fund manager for a successful investment company. You have been approached by a retail investor to create an investment portfolio of six funds with an initial capital outlay of $500,000. The investor, although risk averse, is aiming for a minimum return of 3.5% per annum.

You are required to construct an appropriate portfolio from your own selection of funds and to explain why you have chosen them.

Funds can be found on most investment company websites (including Old Mutual, one of the largest) and can be sourced anywhere worldwide.

· Wordcount: 3,000 words

· Cover, Table of Contents, References and Appendix are excluded from the total wordcount.

· Text alignment: Justified.

· The in-text References and the Bibliography have to be in Harvard’s citation style.