

INVESTMENT FORENSICS

Portfolio Enhancer

Build a better portfolio

The portfolio enhancer was designed with the person who needed proof of the value of including certain asset classes into their current holdings. This is extremely unique in that it shows a before and after comparison of what a portfolio enhancement could do to someone's net worth.

You put in your current allocation.

Once your current allocation is inputted, we will then use our enhancers to improve the efficiency of your portfolio.

Toggle

Portfolio Enhancer

1 Current Allocation

2 Enhanced Allocation

3 Allocation Comparison

What is your portfolio value?

NAME	PORTFOLIO %	VALUE
Money Market	0	\$0
Tax-Free Cash	0	\$0
Taxable Cash	0	\$0
Fixed Income	35	\$350000
Corporate Bonds	10	\$100000
Emerging Markets Debt	0	\$0
Government Bonds	0	\$0
Total	100%	\$1000000

Save

Clear

PORTFOLIO METRICS
Rate of Return
Standard Deviation
Variance Drag Phantom Tax
Sharpe Ratio
Probability of Any Loss in the Next 12 Months
Amount of Money at Risk in the Next 12 Months
Upper Return
Lower Return

Inside the portfolio enhancer are a variety of investments that are designed to enhance the return and reduce the risk of someone’s current holdings without completely dissolving their current portfolio. We simply take your current holdings and then decide a percentage that you would want to have enhanced. *We can use up to 10 different enhancers to make your portfolio more efficient.*

Enhanced Allocation

Chapwood Investments

What percentage of your portfolio would you like to allocate towards enhancers?

40%

How many enhancers would you like to use?

3

NAME	TYPE	ENHANCER %	PORTFOLIO %
Enhancer 1	11	33.33	13.33
Enhancer 2	12	33.33	13.33
Enhancer 3	13	33.33	13.33

Save

Clear

Total	Type	100.00%	40.00%
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PORTFOLIO METRICS		ENHANCED
Rate of Return		16.28%
Standard Deviation		7.19%
Variance Drag Phantom Tax		0.44
Sharpe Ratio		2.13
Probability of Next 12 Month		
Amount of Money at Risk the Next 12 Months		
Upper Return		
Lower Return		

We can enhance any portion of your existing portfolio.

Here we use three enhancers to make the historical returns significantly better than what you currently have.

Allocation comparison

Chapwood Investments

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Print

PORTFOLIO METRICS	CURRENT	ENHANCED
Rate of Return	8.01%	16.28%
Standard Deviation	11.98%	7.19%
Variance Drag Phantom Tax	1.49	0.44
Sharpe Ratio	0.59	2.13
Probability of Any Loss in the Next 12 Months	25.17%	1.17%
Amount of Money at Risk in the Next 12 Months	\$198,223	\$4,214
Upper Return	31.97%	30.65%
Lower Return	-15.94%	1.91%

Here we show your current holdings versus the enhanced holdings. This usually proves that your current holdings need attention.