VF INVEST

QUICK START

Quickly find your way around our investment service.

We warmly welcome you to VF-Invest, our premium investment service. This guide will help you understand our service and, most importantly, our model portfolios. We have summarized the key points for you on the following pages. But first, let's go over some technical details.

Accessing the Premium Area

With your personal login details (you should have received an email with a link to set your password), you gain access to the premium area on our website: vf-cm.com

In the premium area, you will find:

✅ All e-books and special releases

✅ The latest issues of our main letter (delivered to your inbox every Sunday)

Email Delivery Tips:

📌 If you don't see our emails, please check your spam folder.

📌 Mark our emails as "important" or add info@vf-cm.com to your contacts to prevent them from being marked as spam.

Viewing Our Publications:

You may need Adobe Reader or another PDF reader to open our e-books and issues. However, most modern browsers support PDF viewing without additional software.

Regular Publications

Our main VF-Invest issues are published every Sunday (52 issues per year). These provide:

🔹 Market insights: Analysis of trending topics and key developments

🔹 Market Check: In-depth assessment of a specific asset

🔹 Portfolio updates: An overview of all positions, including adjustments and strategy discussions, especially for our Actively Managed Portfolio

Flexibility and Transparency

📌 Investment Options – We offer strategies tailored to different risk levels, from conservative long-term investments to high-risk speculative approaches.

📌 Clear Exclusions – We do not invest in micro-cap stocks or highly illiquid assets.

Updates Based on Market Conditions

We keep you informed every step of the way. Our editorial team actively monitors market conditions and takes necessary action. You will receive:

📩 Timely notifications and order updates via email
✅ Clear and concise instructions, so you stay informed without being overwhelmed

Since our portfolios are meant to be fully replicable, transparency is a priority. Each order includes:
✔ Detailed security information
✔ Available stock exchanges
✔ Limit and position weighting

📌 Advance Notice: Every order is announced ahead of execution so that you have the same conditions as we do. In fact, our editorial team places the exact same orders about one hour after notifying subscribers.

Performance & Cost Transparency

✔ Each position is tracked with individual performance data.
✔ We operate with a real-money portfolio, meaning all investments are executed with real capital.
✔ No overall performance figures – Since every subscriber invests differently, an overall performance metric wouldn't be meaningful.

Let's Get to the Portfolios!

On the following pages, you will find everything you need to know about our model portfolios. Please review this information carefully before getting started!

Utilizing the Model Portfolios Correctly

At VF-Invest, we offer two distinct model portfolios:

✔️ Long-Term Portfolio (LTP) – Focused on steady wealth accumulation over time
✔️ Actively Managed Portfolio (AMP) – Designed to capitalize on mid-term market opportunities

You can follow both portfolios or choose one based on your investment goals and risk tolerance.

Long-Term Portfolio (LTP) – Building Wealth for the Future

The Long-Term Portfolio (LTP) is structured for systematic wealth growth through long-term, diversified investments. We follow a stock savings plan approach and minimize risk through broad diversification.

Investment Strategy
✅ Diversified Holdings – about 20 carefully selected stocks across various industries and regions
✅ Consistent Monthly Investments – Gradual portfolio buildup using a cost-averaging strategy
✅ Long Investment Horizon – Recommended minimum holding period: 10 years
✅ Accessible for All Investors – Start with as little as a few hundred dollars per month

📌 New subscribers don’t need to replicate all existing positions immediately. Your portfolio will align naturally over time as new investments are made.

Risk Management & Portfolio Allocation
✔️ Diversification – Broadly spread investments reduce individual stock or sector risks
✔️ Limit Orders – Ensuring favorable entry prices by placing orders slightly above market price
✔️ No Stop-Loss Orders – We avoid automatic sell-offs to prevent unnecessary losses due to short-term volatility

📌 Structure of the Long-Term Portfolio (LTP)
Our Long-Term Portfolio (LTP) is divided into two parts:

LTP – The Core Portfolio
- 🔹 Strategy: A new stock is highlighted for purchase each month, and all positions are regularly reviewed.
- 🔹 Ideal for: Investors seeking long-term growth with minimal management effort.

LTP Plus – Enhancing Long-Term Returns
- 🔹 Strategy: Focused on major trends and economic cycles, with adjustments to secure gains.
- 🔹 Goal: Stress-free outperformance of broad market indices like the MSCI World.

Actively Managed Portfolio (AMP) – Capitalizing on Mid-Term Opportunities

The Actively Managed Portfolio (AMP) is designed for investors seeking higher returns through active market participation. By leveraging market trends, economic shifts, and special situations, we aim to generate strong returns while managing risk effectively.

Investment Strategy

✔ Active Investing – Positions are held for weeks to months, with clear buy/sell updates

✔ Data-Driven Decisions – Based on fundamental and technical analysis

✔ Clear Order Communication – Every trade includes investment rationale, entry limit, and mental stop-loss levels

📌 New subscribers don't need to enter all positions immediately.

Risk Management & Position Sizing

A key aspect of successful active investing is proper risk management. To ensure a disciplined approach, we use a structured risk model across our three AMP categories:

Portfolio Type	Risk per Trade (% of AMP Portfolio Value)
Conservative	2.00%
Speculative	1.00%
High-Risk	0.50%

🔹 Example of Position Sizing

Let's say the AMP portfolio is worth $100,000, and we decide to buy a stock for the Conservative Portfolio (2% risk per trade):

Stock XYZ price: $20
Mental stop-loss: $15 (risk per share: $20 - $15 = $5)
Risk per trade: 2% of $100,000 = $2,000
Position size: $2,000 ÷ $5 = 400 shares
Total investment: 400 × $20 = $8,000 (8% of AMP)

📌 You don't have to calculate this yourself – we provide the exact position weighting in %, so you can easily apply it to your portfolio.

AMP Variants & Risk Categories

Conservative Portfolio – Balancing Stability & Growth

- Strategy: Focus on large, stable companies with moderate movements.
- Risk per Trade: 2% of AMP portfolio value.
- Ideal for: Investors with moderate risk tolerance seeking controlled, steady returns.

Speculative Portfolio – Higher Risk, Higher Reward

- Strategy: Investments in volatile stocks and sectors with strong growth potential.
- Risk per Trade: 1% of AMP portfolio value.
- Ideal for: Investors comfortable with higher volatility and seeking greater returns.

High-Risk Portfolio – Maximizing Profit Potential

- Strategy: High-risk investments in speculative stocks.
- Risk per Trade: 0.50% of AMP portfolio value.
- Ideal for: Highly risk-tolerant investors willing to take aggressive market positions.

Key Takeaways

- ✔ AMP is actively managed for mid-term opportunities
- ✔ We apply strict risk management for every trade
- ✔ Each position is sized according to predefined risk levels (2%, 1%, or 0.50%)
- ✔ No need for calculations – we provide exact position weightings
- ✔ New subscribers can gradually build their portfolio instead of replicating all current positions

For updates on individual investments, visit our premium area or open the latest Weekly Report, which should already be in your inbox. There, you can view our current positions and access the latest analysis of our long-term portfolio holdings.