

# SelfWealth

*SelfWealth is changing the way people invest... so they can live the lives they want to live.*

SelfWealth is changing the way people invest and empowering individuals and SMSF trustees to manage their own investments. SelfWealth provides the tools and resources to enable investors to potentially outperform the market without paying high fees and commissions.

Key benefits include;

- **Access to top investors to help members outperform.** Members can follow others because they like their portfolio and track record. Using the strategies of those they follow, they can create a Target Portfolio and measure its performance over time, testing a strategy before diving in. If the strategy works they can update their portfolio to reflect their Target portfolio at any time.
- **Meaningful measurement of members' investment portfolios.** The SelfWealth Best Investor index (the SW200) is a benchmarking index based on the top 200 performing portfolios in SelfWealth. It doesn't make much sense comparing a portfolio as an individual or an SMSF to the ASX200. The SW200 allows members to compare themselves to other investors just like them.
- **SelfWealth has a WealthCheck score to help members improve the 'health' of their portfolio.** Based on factors such as performance, SafetyRating and how much a member collaborates with others in the SelfWealth community their score can range from an A+ to an F.
- **SelfWealth assigns a SafetyRating to each portfolio and assists members to improve their rating to give their portfolio its best chance to succeed.** It encourages members to diversify their portfolio and assists with asset allocation.
- **Members have access to great research and tools** such as the Value Analyser, a powerful tool to look at individual stocks and see how they are valued, and the Strategy Builder, which provides members with their own personal portfolio builder, so they can build a strategy and back test the results.

We welcome you to log into the SelfWealth demonstration account and take a look for yourself;

[www.selfwealth.com.au](http://www.selfwealth.com.au)

Username: sw205

Password: wealth1

## Dashboard



**James Bond**

Joined 28/10/2012 [Member Profile](#)

**Member Bio:** Fast cars and gadgets. However I am a little bit more conservative with my investing portfolio

[Tour](#)

[MyPortfolio](#) [TargetPortfolio](#) [Benchmarking](#) [Comparison](#) [Breakdown](#)

### WealthCheck

**A**

1.3%  
1 Day

0.1%  
1 Year

### Performance

6.1%  
Last Month

3.4%  
3 Months

10.7%  
Since Joining

92nd  
Position

7.8%  
6 Months

5.4%  
Annualised

### SafetyRating



6  
Follows

7  
Watches

### MyPortfolio Listed Holdings and Cash

Broker Status: connected to Bell Direct last update 27/08/2014

Estimated Valuation: **5.23% Under Valued**

Estimated Yield: **3.4%**

Code	Name	Units	Price	Value	%
AWI	AUST WEALTH INVEST.	20,000	0.180 -	3,600.00	0.61
BHP	BHP BILLITON LIMITED	1,000	34.49 ↑	34,490.00	5.84
BXB	BRAMBLES LIMITED	4,000	9.80 ↑	39,200.00	6.64
CBA	COMMONWEALTH BANK	550	82.76 ↑	45,518.00	7.71
CSL	CSL LIMITED	862	79.96 ↑	68,925.52	11.68
ICN	ICON ENERGY LIMITED	30,000	0.120 -	3,600.00	0.61
IOZ	ISHARES MSCI AUS 200	3,000	23.96 ↑	71,880.00	12.18
IVV	ISHARES S&P 500	250	239.67 ↑	59,917.50	10.15
NAB	NATIONAL AUST. BANK	1,336	33.22 ↑	44,381.92	7.52
RIO	RIO TINTO LIMITED	459	60.70 ↑	27,861.30	4.72
TLS	TELSTRA CORPORATION	6,203	5.77 ↑	35,791.31	6.06
TWE	TREASURY WINE ESTATE	11,234	4.86 ↑	54,597.24	9.25
WOW	WOOLWORTHS LIMITED	1,632	34.48 ↑	56,271.36	9.53
WPL	WOODSIDE PETROLEUM	562	40.69 ↑	22,867.78	3.87
Cash	Macquarie CMA			21,365.26	3.62

**Listed Holdings and Cash Total** **\$590,267.19** **100.00**

**Other Assets and Liabilities** **\$450,000.00**

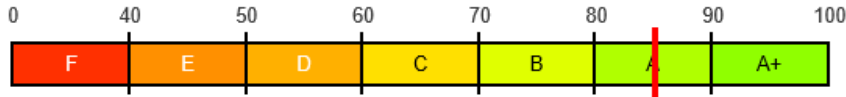
**MyPortfolio Total** **\$1,040,267.19**

Back

# WealthCheck Score

MyPortfolio

**A**



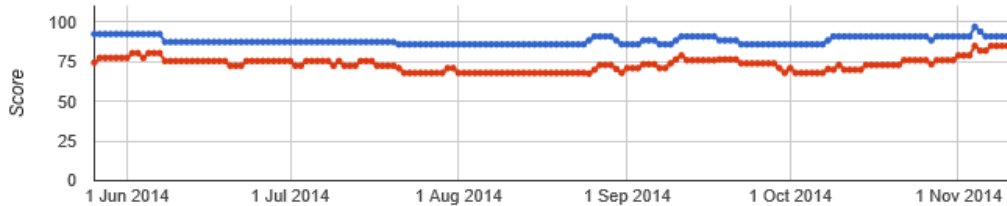
Hi James, we've calculated your WealthCheck Score as an A. WealthCheck measures the performance of MyPortfolio and your engagement with SelfWealth. There are a number of things you can do to improve your score, take a look at some of the suggestions below and try some out to ensure your future is in tip top shape.

## Breakdown

<b>Performance:</b> This measures how well your share portfolio is performing compared to other investors in SelfWealth. <a href="#">Find out More</a>	<b>18</b> / 30
Your Position: Top 50%	
<b>SafetyRating:</b> This is a measure of the diversification of MyPortfolio. <a href="#">Find out More</a>	30 / 30
Your Rating: 3 Star	
<b>Valuation:</b> Are your stocks cheap or expensive for what you're paying? <a href="#">Find out More</a>	<b>12</b> / 15
Your Position: Under Valued	
<b>TargetPortfolio Set:</b> Unlock the secret to your financial freedom. <a href="#">Find out More</a>	10 / 10
TargetPortfolio Set: Yes	
<b>Number of Watches and Follows by you:</b> Connect to achieve. <a href="#">Find out More</a>	10 / 10
Your Total: 42	
<b>Regular Engagement (Weekly):</b> Take action. <a href="#">Find out More</a>	5 / 5
Your Engagement: 5	
<b>Total</b>	<b>85</b> / 100

[View calculation method](#)

WealthCheck 6 Month History



Back

# SafetyRating Score

MyPortfolio



Hi James, SafetyRating measures the diversification of MyPortfolio. We've calculated MyPortfolio SafetyRating to have a perfect score!

## Breakdown

<b>Stocks Held in Portfolio:</b> A score based on the number of stocks in MyPortfolio.	10 / 10
<b>Stocks Spread Evenly:</b> How evenly MyPortfolio is spread across different stocks.	10 / 10
<b>Stocks Considered Lower Risk:</b> A measure of the number of stocks considered lower risk in MyPortfolio, such as stocks listed on the ASX100, Australian ETPs, cash and interest rate securities or convertible notes.	10 / 10
<b>Asset Allocation:</b> A score based on the different types of asset classes in MyPortfolio (e.g. Australian shares and ETFs).	10 / 10
<b>Total</b>	40 / 40

[View calculation method](#)

Back

## All Members

View and filter the list of portfolios for all our Members.

**Search Criteria**

Members Nickname Like :

[Reset Criteria](#)

**WealthCheck & SafetyRating**

**WealthCheck**

F E D C B A A+

**SafetyRating**

☆☆☆☆ ☆☆☆ ☆☆☆

**Investor & Portfolio Type**

**Investor Type**

Male - Personal Female - Personal SMSF - Accumulation SMSF - Pension Other

**Portfolio Type**

Verified Manual

**Member Like You**

**Years to Retirement**

10+ 0-10 Retired

**Attitude Towards Taking Risk**

Low Medium High

**Performance Preference**

Income Balanced Growth

**Performance, Valuation & Yield**

1 Month 3 Month 6 Month 1 Year **Annualised** Yield Valuation

Community Breakdown

Annualised | 0-10% | 10-20% | 20-30% | 30-40% | 40-50% | 50-60% | 60-70% | 70-80% | 80-90% | 90+% |

-83.1% -3.8% 2.1% 4.5% 8.5% 11.8% 15.0% 17.8% 21.2% 26.2% 140.1%

**Results**

Order By  Then

[Tour](#)

<p><b>Bean</b> (Joined 26-Oct-2012)</p>	<p><b>A+</b></p> <p>WealthCheck SafetyRating</p>	<p>3.9%</p> <p>1 Month</p>	<p>11.3%</p> <p>3 Month</p>	<p>8.6%</p> <p>6 Month</p>	<p>25.2%</p> <p>1 Year</p>	<p>48.0%</p> <p>Annualised</p>	<p>2.6%</p> <p>Yield</p>	<p>24.7%</p> <p>Valuation</p>	<p>Followed Watched</p>
<p><b>MyPortfolio</b> (Joined 26-Oct-2012)</p>	<p><b>A</b></p> <p>WealthCheck SafetyRating</p>	<p>6.1%</p> <p>1 Month</p>	<p>3.4%</p> <p>3 Month</p>	<p>7.8%</p> <p>6 Month</p>	<p>0.1%</p> <p>1 Year</p>	<p>5.4%</p> <p>Annualised</p>	<p>3.4%</p> <p>Yield</p>	<p>5.2%</p> <p>Valuation</p>	<p>Followed Watched</p>
<p><b>Bradmanesque</b> (Joined 01-Oct-2012)</p>	<p><b>B</b></p> <p>WealthCheck SafetyRating</p>	<p>6.4%</p> <p>1 Month</p>	<p>6.0%</p> <p>3 Month</p>	<p>6.8%</p> <p>6 Month</p>	<p>9.9%</p> <p>1 Year</p>	<p>19.9%</p> <p>Annualised</p>	<p>3.9%</p> <p>Yield</p>	<p>-6.0%</p> <p>Valuation</p>	<p>Followed Watched</p>











## TargetPortfolio

Cancel Save

Your TargetPortfolio is used for comparing and rebalancing MyPortfolio. It can be made up by a combination of up to 7 SelfWealth member portfolios that you are 'Following', MyPortfolio, Cash plus Direct Securities.

[▶ Tour](#)



By default any unallocated weights will be attributed to MyPortfolio.

 <b>MyPortfolio</b> Joined 26-Oct-2012	<b>A</b> WealthCheck	 Safety Rating	3.4% 3 Month	5.4% Annualised	<input type="text" value="30.0"/>	
 <b>SteadyEddy</b> Joined 27-Mar-2013	<b>B</b> WealthCheck	 Safety Rating	4.3% 3 Month	14.5% Annualised	<input type="text" value="10.0"/>	<input type="button" value="Delete"/>
 <b>Hightide</b> Joined 25-Apr-2013	<b>C</b> WealthCheck	 Safety Rating	2.9% 3 Month	12.3% Annualised	<input type="text" value="10.0"/>	<input type="button" value="Delete"/>
 <b>Marathon</b> Joined 25-Apr-2013	<b>A</b> WealthCheck	 Safety Rating	9.6% 3 Month	18.2% Annualised	<input type="text" value="10.0"/>	<input type="button" value="Delete"/>
 <b>Bradmanesque</b> Joined 01-Oct-2012	<b>B</b> WealthCheck	 Safety Rating	6.0% 3 Month	19.9% Annualised	<input type="text" value="40.0"/>	<input type="button" value="Delete"/>

Total Weighting % 100

Currently Following **4/7**

### TargetPortfolio Setup

-  Add more members to your TargetPortfolio
-  Add Cash or Direct Securities to your TargetPortfolio

Cancel Save

## TargetPortfolio

Your TargetPortfolio is used for comparing and rebalancing SelfWealth member portfolios that you are 'Following', MyP

By default any unallocated weights will be attributed to MyP

**MyPortfolio**  
Joined 26-Oct-2012

**SteadyEddy**  
Joined 27-Mar-2013

**Hightide**  
Joined 25-Apr-2013

**Marathon**  
Joined 25-Apr-2013

**Bradmanesque**  
Joined 01-Oct-2012

**Alerts**

- SteadyEddy has updated their portfolio - details. 6d Save
- StagingMax is now following you. 61d Tour
- coolbaci is now following you. 66d Tour
- Increase your WealthCheck Score. Click here to find out more. 89d
- New Tour feature now available on your Dashboard and Rebalancing windows. Click here to find out more. 90d
- Increase your WealthCheck Score. Click here to find out more. 114d
- Check out your SafetyRating Score, now available on your dashboard. Click here to find out more. 132d

**More Alerts**  
[See All](#)

	★ ★ ★	2.9%	12.3%	10.0	Delete
WealthCheck	Safety Rating	3 Month	Annualised		
	★ ★ ★	9.6%	18.2%	10.0	Delete
WealthCheck	Safety Rating	3 Month	Annualised		
	★ ★ ★	6.0%	19.9%	40.0	Delete
WealthCheck	Safety Rating	3 Month	Annualised		

Total Weighting %

100

Currently Following 4/7

### TargetPortfolio Setup

Add more members to your TargetPortfolio GO

Add Cash or Direct Securities to your TargetPortfolio GO

Cancel Save

## Dashboard



**James Bond**

Joined 28/10/2012 ▶ [Member Profile](#)

▶ **Member Bio:** Fast cars and gadgets. However I am a little bit more conservative with my investing portfolio

▶ [Tour](#)

[MyPortfolio](#) [TargetPortfolio](#) [Benchmarking](#) [Comparison](#) [Breakdown](#)

### WealthCheck

**A+**

0.9%

1 Day

13.0%

1 Year

### Performance

5.7%

Last Month

5.2%

3 Months

162.0%

Since Joining

### SafetyRating



3.6%

6 Months

61.3%

Annualised

### TargetPortfolio Structure

Weighting %

Portfolio	Joined	WealthCheck	Safety Rating	3 Month	Annualised	Weighting %
<b>MyPortfolio</b>	Joined 28-Oct-2012	<b>A</b>	★ ★ ★	3.4%	5.4%	30.00
<b>SteadyEddy</b>	Joined 27-Mar-2013	<b>B</b>	★ ★ ★	4.3%	14.5%	10.00
<b>Hightide</b>	Joined 25-Apr-2013	<b>C</b>	★ ★ ★	2.9%	12.3%	10.00
<b>Marathon</b>	Joined 25-Apr-2013	<b>A</b>	★ ★ ★	9.6%	18.2%	10.00
<b>Bradmanesque</b>	Joined 01-Oct-2012	<b>B</b>	★ ★ ★	6.0%	19.9%	40.00

### Underlying Investments

Estimated Valuation: **0.80% Under Valued**

Estimated Yield: **3.1%**

Code	Name	Price	%
AGKHA	FRN 08-JUN-39	105.38 ↑	0.18
AMP	AMP LIMITED	5.90 ↑	0.38
ANZ	ANZ BANKING GRP LTD	32.88 ↑	1.46
ANZPC	ANZ BANKING GRP LTD	101.35 ↑	0.09
ASX	ASX LIMITED	37.24 ↑	0.59



## Dashboard



**James Bond**

Joined 28/10/2012 [Member Profile](#)

**Member Bio:** Fast cars and gadgets. However I am a little bit more conservative with my investing portfolio

[Tour](#)

[MyPortfolio](#) [TargetPortfolio](#) [Benchmarking](#) [Comparison](#) [Breakdown](#)

Show TargetPortfolio?       Show SW200?       Show As \$       Total Return? ⓘ

Index: XNT - S&P/ASX 200 NET TOTAL RETURN      Period: 3 Months      Frequency: Daily

