

SAVE & INVEST PORTFOLIO SERIES

Learn to build winning portfolio with new investment series



Starting next Sunday, the series will feature simulated portfolios of a young working adult, a married couple with two young children and a retiree. ST PHOTOS: ONG WEE JIN, DESMOND WEE, CHEW SENG KIM

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Sunday Times will track simulated portfolios of a working adult, married couple and retiree

Lorna Tan Invest Editor

Here's your chance to learn how to build a winning portfolio amid the uncertain market.

Over the next 12 months, The Sunday Times will feature a new series that will showcase and track the simulated portfolios of three types of retail investors. The year-long Save and Invest Portfolio Series campaign aims to encourage and equip investors with the knowledge to save for the future.

The initiative will involve the Singapore Exchange (SGX) collaborating with CFA Society Singapore and MoneySense, the national financial education programme.

Starting next Sunday, the series will feature simulated portfolios of a young working adult, a married couple with two young children and a retiree.

Their portfolios are guided by a panel of four CFA charterholders who are volunteers with CFA Society Singapore and have 77 years of experience collectively as investment professionals.

SMART INVESTING

We are excited about this initiative that showcases real-life investment portfolios of people at different life stages that the average investor can relate to. This series is an extension of SGX's commitment to educating and engaging our retail investors, and to arm them with skills and confidence.

MS LYNN GASPAR, head of retail investors at SGX.



The series aims to guide retail investors in basic investment techniques and how to build a portfolio in accordance with their investment goals and risk tolerance.

The portfolios will be tracked over 12 months. Different types of investment instruments and choices, including relatively new ones such as the Singapore Savings Bonds, will be introduced.

Mr Lee Boon Ngiap, Monetary Authority of Singapore's assistant managing director of capital markets, says it is essential to save and invest for the long term to grow our retirement nest egg.

He says: "In investing, one should consider one's goals, investment objectives, existing commitments and risk appetite.

"We encourage the public to visit the MoneySense website and Facebook page which regularly feature informative guides and useful articles on investing."

He adds that the Save and Invest Portfolio Series will help enhance financial knowledge and complement MoneySense in empowering investors to make better-informed decisions.

Ms Lynn Gaspar, head of retail investors at SGX, says: "We are excited about this initiative that showcases real-life investment portfolios of people at different life stages that the average investor can relate to. This series is an extension of SGX's commitment to educating and engaging our retail investors, and to arm them with skills and confidence."

She adds: "We hope this will set the momentum for more investors to start or progress in their investing journey."

The SGX Academy and CFA Society Singapore will jointly host six public seminars that are aligned with themes featured in the series.

These seminars will allow retail investors to meet SGX Academy trainers and CFA Society professionals.

Ms Jan Richards, president of CFA Society Singapore, says one of the most fundamental and effective ways to protect investors is to equip them with the knowledge and tools to make informed decisions.

"This has become ever more imperative as global markets remain uncertain and the investment environment challenging," she adds.

"We hope that the Save and Invest Portfolio Series can introduce The Sunday Times readers to a more disciplined way of investing, inspire them to learn more and eventually help them grow their hard-earned savings into a comfortable nest egg."

Business editor Lee Su Shyan believes readers will get an in-depth look into how different investing decisions play out in real life. She says: "We at Sunday Times Invest feel very strongly about financial literacy and this series will enhance retail investors' understanding of investing.

"Readers are welcome to write in with their views and suggestions to Invest editor Lorna Tan."

Watch this space.