

Portfolio Analysis: Igniting a long-term spirit in a short-term world.

An abstraction to a new portfolio analysis framework.

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General Outline

- I. *Introduction* 
- II. *Rationale, Philosophy and Objectives* 
- III. *Portfolio analysis roots: Don't put all your eggs in one basket* 
- IV. *Research design in portfolio analysis* 
- V. *Sloan Legacy: Selecting criteria and variables for portfolio analysis* 
- VI. *Growth patterns matter* 
- VII. *An abstraction about Portfolio Analysis frameworks* 
- VIII. *The Boston Consulting Group Growth-Share Matrix*
- IX. *The General Electric Portfolio model*
- X. *Shell Directional Policy Matrix*
- XI. *Arthur D. Little Strategic Condition Matrix*
- XII. *Abell and Hammond 3x3 Investment Opportunity Matrix*
- XIII. *Other existing frameworks*
- XIV. *Comparative Advantages and Limitations of Portfolio analysis*
- XV. *Igniting a long-term spirit in a short-term world*
- XVI. *Short sightedness*
- XVII. *Long Term Planning*
- XVIII. *Our own approach to portfolio analysis. An abstraction.*
- XIX. *Summary and Conclusions*



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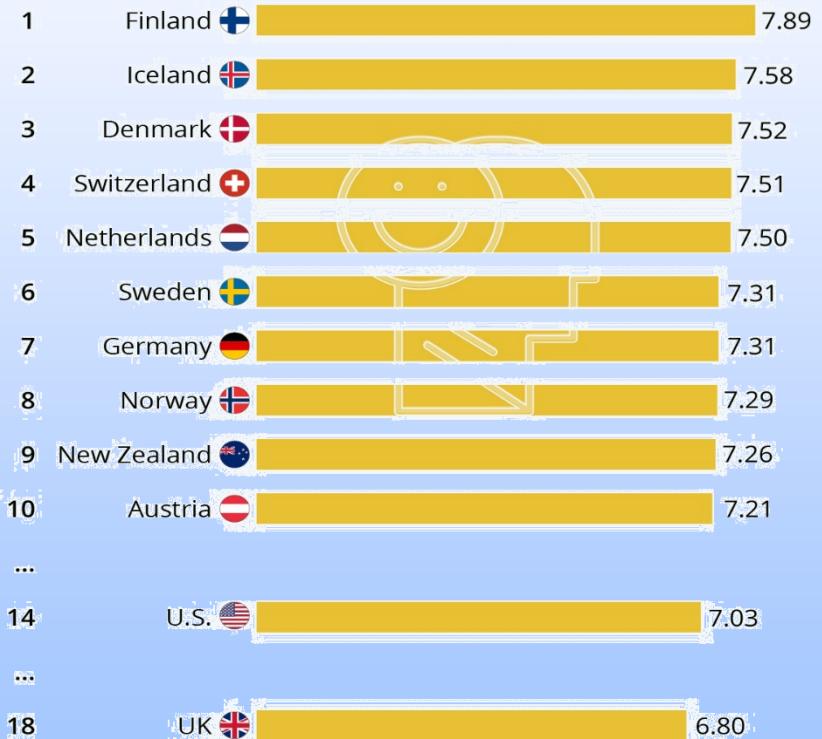
Why do you think these 10 countries have so much happiness?

- Simply because their middle-class families are content.
- At least 60% of each country belongs to the group of people making a living with an income between US\$28,800 to US\$175,200 per year per family.
- The salaries they get allow these societies to be free to choose and be comfortable, at ease, with hope in the future, and knowing that by working wisely in a sustainable manner they will increase their delight for living.



The Happiest Countries in the World

Ranking of the world's happiest countries by index value (2020)*

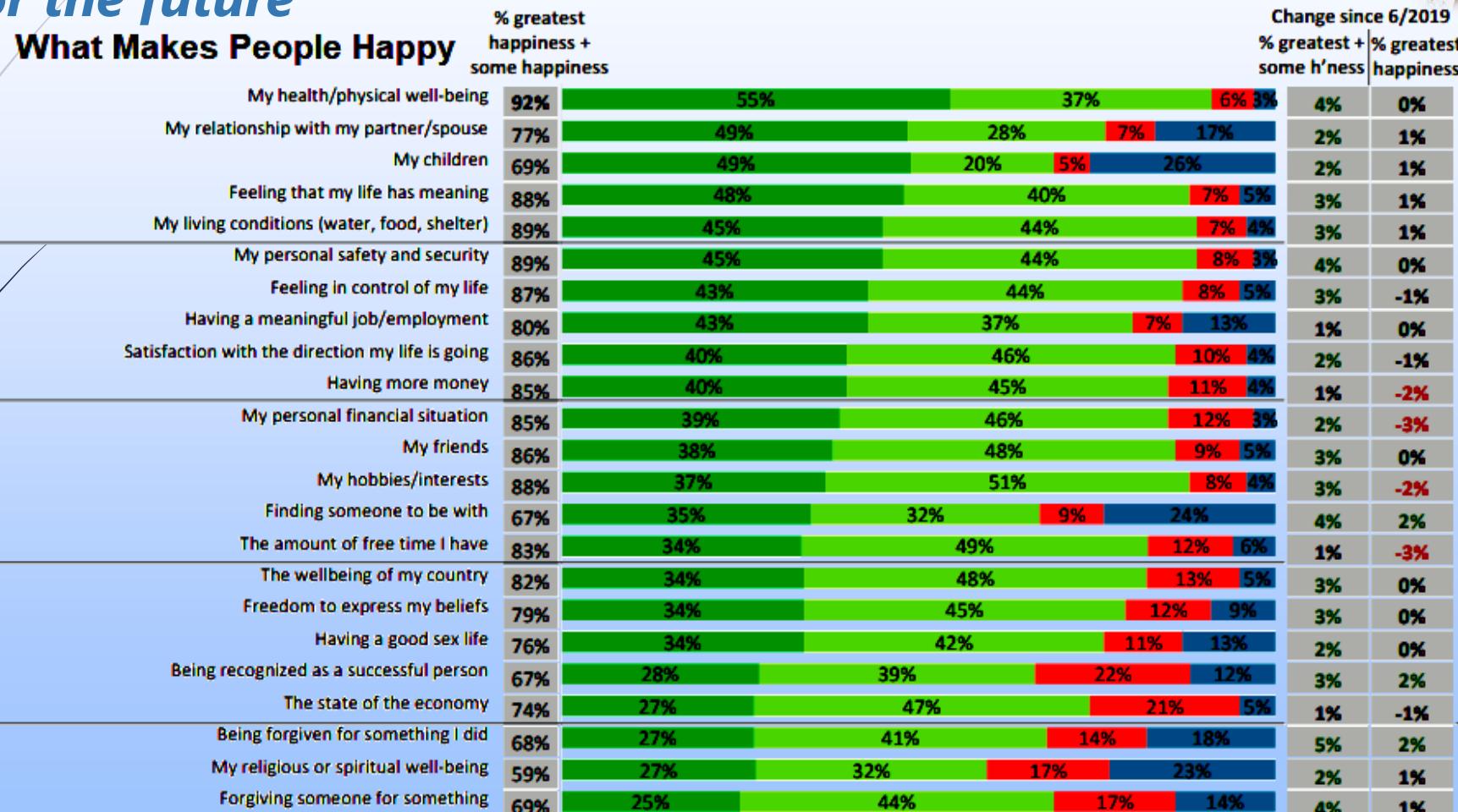


* Based on GDP per capita, social protection, health and life expectancy, freedom of choice, generosity, corruption perception
Source: World Happiness Report



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Source: The Global Happiness 2020 survey by Ipsos survey of 19,516 adults in 27 countries carried out between 24 July and 7 August 2020.

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What brings people the greatest happiness?



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- Knowing that the wellbeing of my country is outstanding
- Impeccable justice system
- Zero tolerance to corruption
- Democracy always evolving for better
- Safety of living in a country of hope
- Sustainability-pro-environment measures
- Good ecosystem for entrepreneurship

Economic-social-Political system

- Having enough money to be content
- Link between having a meaningful job or company and income
- Cover the basics of each lifestyle and more

Financial Situation

What portfolio provides these dynamics to all?

Inner Sources of Contentment

- Good Health, Physical well being
- Relationship with partner
- Children
- Meaningful sense living for a cause
- Equilibrium and replenishment through having a personal life outside the job (hobbies, interests).

Individual Living Conditions

- Quality Shelter
- Water, electricity
- Good neighborhood conditions
- Prime education
- Safety and Security

Community

- Friendships
- Sense of belonging to someone
- Social interactions
- Recognition
- Freedom to express thoughts-feelings

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