



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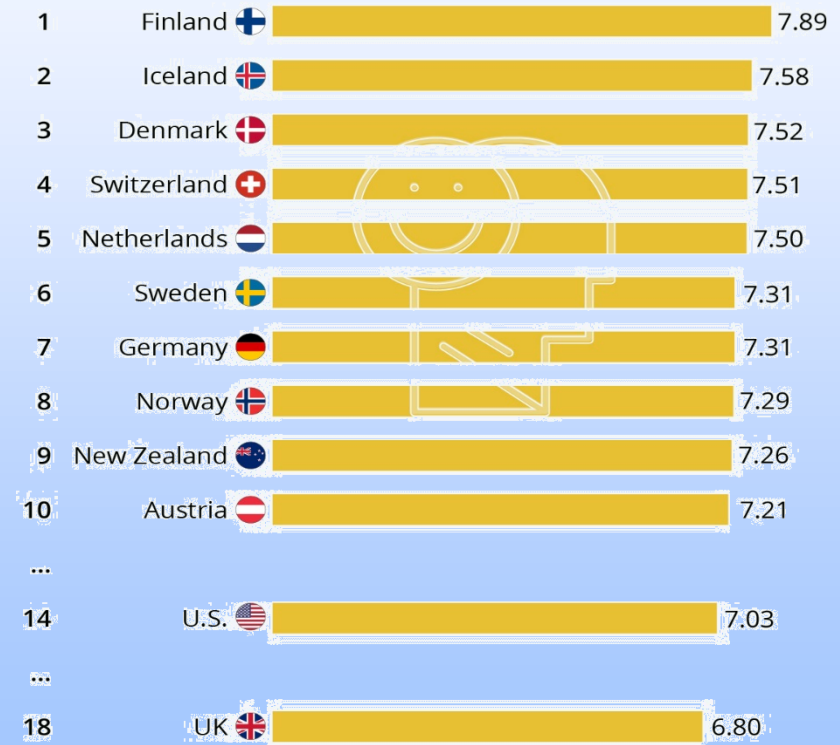
Why do you think these 10 countries have so much happiness?

- *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)*

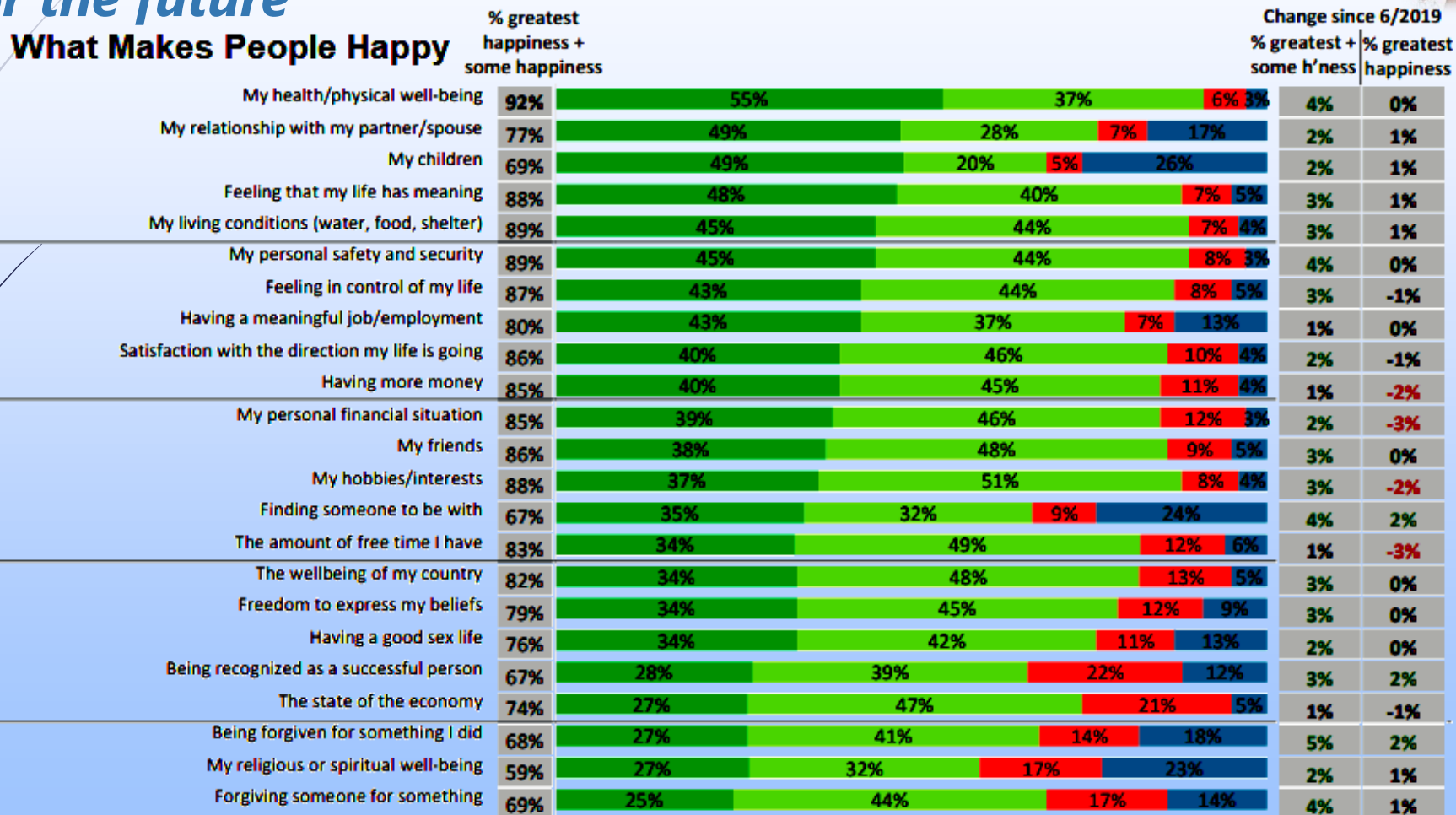


* Based on GDP per capita, social protection, health and life expectancy, freedom of choice, generosity, corruption perception
Source: World Happiness Report



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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?

Top five of 29 sources of happiness in 2020



My health & physical well-being

55%



My relationship with my partner

49%



My children

49%



Feeling that my life has meaning

48%



My living conditions

45%

Bottom five of 29 sources of happiness in 2020



Time spent on social media

11%



Moving to another country

16%



My country's new political leadership

21%



Material possessions

21%



Access to sports & entertainment

23%

% saying the following does, or could, give you the greatest happiness

19,516 adults polled in 27 countries from July 24 to Aug. 7, 2020



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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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- 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

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

What portfolio provides these dynamics to all?

- 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

Community

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

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