

Mutual Fund Portfolio Performance Evaluation

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

Dear [Recipient's Name],

I hope this letter finds you well. As part of our ongoing commitment to keeping you informed about your investment portfolio, we have conducted a performance evaluation of your mutual fund holdings for the period ended [Insert Date].

Portfolio Overview

Your current mutual fund portfolio consists of the following funds:

- [Fund Name 1] - [Percentage Allocation]%
- [Fund Name 2] - [Percentage Allocation]%
- [Fund Name 3] - [Percentage Allocation]%

Performance Summary

The following is a summary of the performance of your mutual fund portfolio:

Fund Name	Annual Return (%)	Benchmark Return (%)
[Fund Name 1]	[Annual Return 1]	[Benchmark Return 1]
[Fund Name 2]	[Annual Return 2]	[Benchmark Return 2]
[Fund Name 3]	[Annual Return 3]	[Benchmark Return 3]

Future Recommendations

Based on the current market trends and your investment goals, we recommend the following adjustments to your portfolio:

- [Recommendation 1]
- [Recommendation 2]
- [Recommendation 3]

If you have any questions or would like to discuss this evaluation in more detail, please do not hesitate to reach out.

Thank you for your continued trust in us.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Contact Information]