

Investment Portfolio Recap

Date: [Insert Date]

Dear [Client's Name],

I hope this letter finds you well. As part of our commitment to keeping you informed, I am pleased to provide you with a recap of your investment portfolio as of [Insert Date].

Portfolio Summary

Your current portfolio comprises the following asset allocations:

- Equities: [Percentage]%
- Fixed Income: [Percentage]%
- Real Estate: [Percentage]%
- Cash/Cash Equivalents: [Percentage]%

Performance Overview

Your portfolio has achieved a total return of [Percentage]% over the last [Time Period]. Below are the highlights:

- Best Performing Asset: [Asset Name], with a return of [Percentage]%
- Worst Performing Asset: [Asset Name], with a return of [Percentage]%

Market Outlook

Looking ahead, we believe that [Insert Outlook Information].

Please feel free to reach out if you have any questions or would like to discuss your portfolio in further detail.

Thank you for trusting us with your investments.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Contact Information]