

# Investment Plan

## Interstellar Super Fund

The goal of this investment plan is to identify the investment strategy that the interstellare super fund will employ in order to outperform a traditional fund, whilst managing risk & adequate liquidity.

The plan will give an overview of the asset classes that funds will be invested in and their respective allocations in order to achieve the above stated goal.

The plan will have three broad phases, and will be reviewed annually for rebalancing of assets, along with an analysis on the efficacy of the strategy at that particular point in time.

### Phase 1

Age bracket: 30yrs - 40yrs.



Investments during this period of time will be focused primarily on liquid asset classes, with higher beta in the market, along with intelligent allocations that will manage risk. Rebalancing will occur more frequently in order to maintain allocation percentages.

Assets	Allocation	Risk Classification	Notes / Examples
Digital Assets	40%	High	Bitcoin, Ethereum
Derivatives	10%	High	CFDs, Straddles & Options
Shares	20%	Medium	Tesla, etc
ETF & Index Funds	5%	Medium	QQQ, Nasdaq, Russell
Crowd Funding	5%	High	Private company investments
Art	5%	High	Digital collectibles, west coast art
Cash	15%	Low	
Total	100%		

## Phase 2

Age bracket: 40yrs - 50yrs.

Risk Appetite: Low  High



Investments during this period of time will see the fund transition into less liquid, fixed asset classes, with higher total purchase requirements. Beta will decrease, and as will overall risk appetite. Allocations to higher beta assets will remain, but in lower proportions. Rebalancing will occur less frequently.

Assets	Allocation	Risk Classification	Notes / Examples
Digital Assets	20%	High	Bitcoin, Ethereum
Derivatives	5%	High	CFDs, Straddles & Options
Shares	20%	Medium	Tesla, etc
ETF & Index Funds	10%	Medium	QQQ, Nasdaq, Russell
Private Equity	10%	High	Crowd Funding + Private Angel Investing
Property	25%	Low	Business Real Property
Art	5%	High	Higher value antiques & older art
Cash	5%	Low	
<b>Total</b>	<b>100%</b>		

## Phase 3

Age bracket: > 50yrs

Risk Appetite: Low  High



In this final, close-to-retirement phase, investment proportions will continue to grow into less liquid, fixed asset classes, with higher total purchase requirements (eg; property). Beta will decrease further, along with overall risk appetite.

Allocations to higher risk/return assets will remain, but in lower proportions. Rebalancing will occur less frequently.

<b>Assets</b>	<b>Allocation</b>	<b>Risk Classification</b>	<b>Notes / Examples</b>
<b>Digital Assets</b>	15%	High	Bitcoin, Ethereum
<b>Derivatives</b>	5%	High	CFDs, Straddles & Options
<b>Shares</b>	15%	Medium	Tesla, etc
<b>ETF &amp; Index Funds</b>	10%	Medium	QQQ, Nasdaq, Russell
<b>Private Equity</b>	10%	High	Crowd Funding + Private Angel Investing
<b>Property</b>	35%	Low	Larger scale property
<b>Art</b>	5%	High	Higher value antiques & older art
<b>Cash</b>	5%	Low	
<b>Total</b>	<b>100%</b>		