

Your Portfolio – Maintaining Perspective

This week's AAI **Weekly Digest** highlights these “must-read” AAI articles:



Allocating to Manage Risk: A Case Study

The downside risk a retired couple's portfolio faces is examined, along with a strategy to reduce the damage of turbulent market conditions.

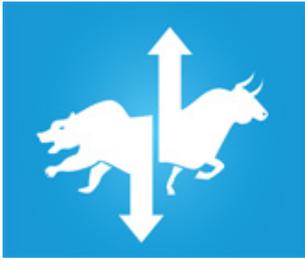
A Former Hedge Fund Manager's Contrarian Strategy

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A former hedge fund manager discusses how the strategies he used managing client money also applies to managing his family's money. Following a top-down approach to asset selection, he uses anticipated relative value among stocks, bonds and cash to determine his asset allocation. This oftentimes puts him at odds with the “hot” asset class of the moment.

Your Portfolio: Maintaining Perspective



Given the recent bumps in the stock market, we revisit an article written in late 2008, during the last market meltdown to give you some perspective. Financial turmoil can prompt an emotional response that causes investors to flee stock holdings. But this can cause long-term harm to your portfolio. Instead, you need to put things in perspective and stick to the fundamental rules of investing.

Peculiar Facts From 500 Years of Finance



When it comes to the intersection of the financial markets and human history, there is a kaleidoscope of tales drawn from centuries of market mischief, mishaps and mayhem. This article reveals a few less-known but notable events drawn from the past half-millennium that might pique your own interest in the rivers of time that have led us to the present day.

Our **Member Question** for this week is:

Compared to how you felt at the start of the year, how optimistic or pessimistic are you about your investments over the coming 12 months?

[Vote Now »](#)

Vote to answer this week's Special Question: *How has your investing outlook for the next 12 months changed since the start of the year?*

Last Week's Results:

Did you experience problems logging into your online brokerage account(s) this past week?

No : 64%

I didn't try to log into my account(s) this week : 19%

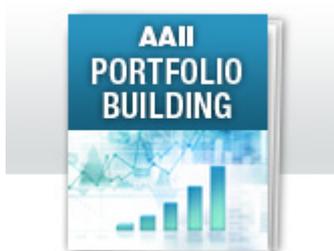
Yes : 17%

Poll results are as of 9 a.m. (Central) on Monday. 2,032 respondents.



[AAII Survey: Readers Respond to Brokerage Outages During Market Turmoil](#)

The severe market volatility of a couple of weeks ago left some retail investors unable to access their online accounts to place trades or even check account balances. Last week's reader survey asked whether anyone experienced similar issues. The follow-up special question asked whether individual account holders should have any recourse against the financial services firms that can't handle the spike in online traffic on heavy trading days.



[AAII e-book: Portfolio Building](#)

“Easier said than done” is a common saying that applies well to developing an overall strategy for your investment portfolio. The basic concepts are relatively easy, but they become more complex and less clear-cut when it comes to applying them to real-world situations. This e-book, available exclusively to AAI members, is designed to bridge the gap between theory and practice.

The AAI Weekly Digest is one of the many **benefits** of AAI membership. To learn more, consider a **30-day Trial AAI Membership** to start becoming an effective manager of your own assets.