

Portfolio Review Template

Your Portfolio Deserves a Performance Review

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Your Portfolio Deserves a Performance Review

The best investors don't just review stocks. They review their decisions.

Use this worksheet every quarter to evaluate your portfolio objectively, identify mistakes, and ensure every holding still deserves its place.

Small improvements, repeated consistently, compound into exceptional long-term results.

Portfolio Snapshot

Review Date

Portfolio Value

Cash Allocation

Number of Holdings

Benchmark

Current Allocation

Asset	Portfolio %	Target %

Performance Review

Portfolio Return

Benchmark Return

Difference

Am I outperforming because of skill or luck?

Thesis Review

For every major holding ask:

Does the original investment thesis still hold?

- ☐ Yes
- ☐ Partially
- ☐ No

Has anything fundamentally changed?

Would I buy this investment again today?

- ☐ Yes
- ☐ No

Portfolio Risks

Am I overexposed to:

- ☐ One company
- ☐ One sector
- ☐ One country
- ☐ One theme
- ☐ One currency

Comments

Biggest Winners

Why did they perform well?

Did I expect this outcome?

- ☐ Yes
- ☐ No

Biggest Losers

Why did they underperform?

Is the original thesis broken?

- ☐ Yes
- ☐ No
- Unsure
- ☐

Mistakes This Quarter

What investing mistakes did I make?

What lessons will I carry forward?

Opportunities

Companies to research next

Ideas worth monitoring

Action Plan

- ☐ Increase a position
- ☐ Reduce a position
- ☐ Sell a holding
- ☐ Add to watchlist
- ☐ Continue holding

Notes

Next Review

Next Review Date

Top priorities before then

Final Reminder

The goal is not to own more stocks.

The goal is to own better businesses with greater conviction.

Review your portfolio with the same discipline you used when you first invested.