

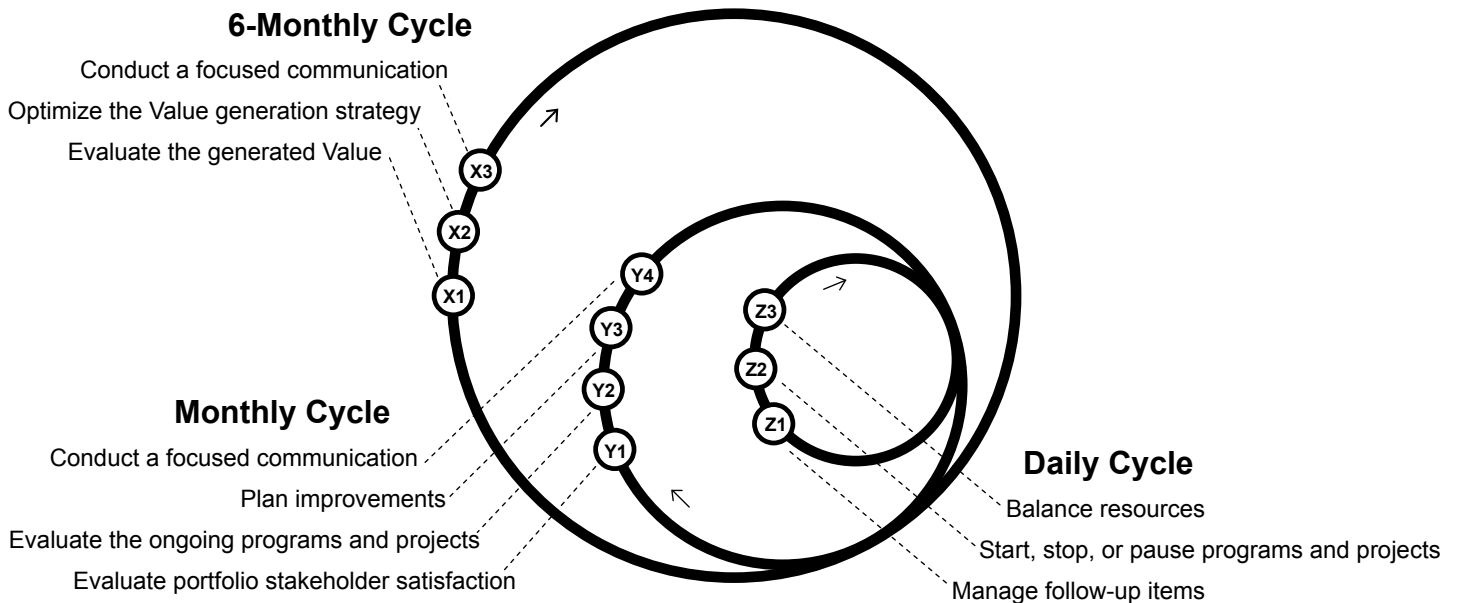


**OMIMO**

Open Minimalist Modules

Minimalist portfolio management with

# P5.express



Gapped Handout

**DRAFT**



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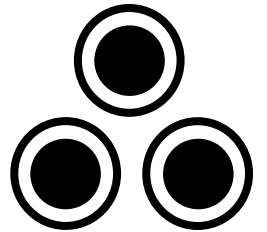
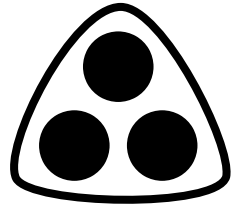
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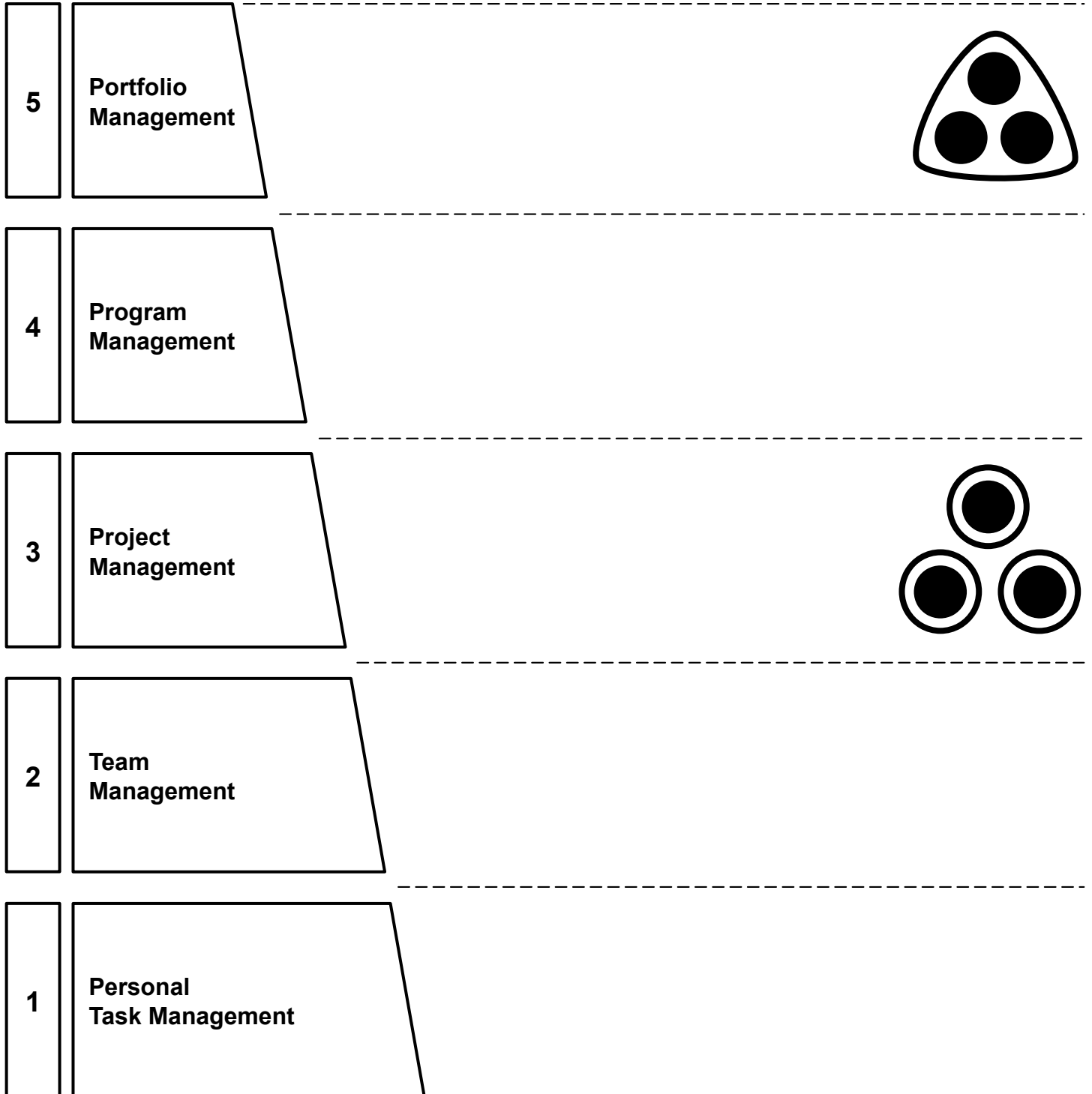
Part 1

# ***Why portfolio management?***

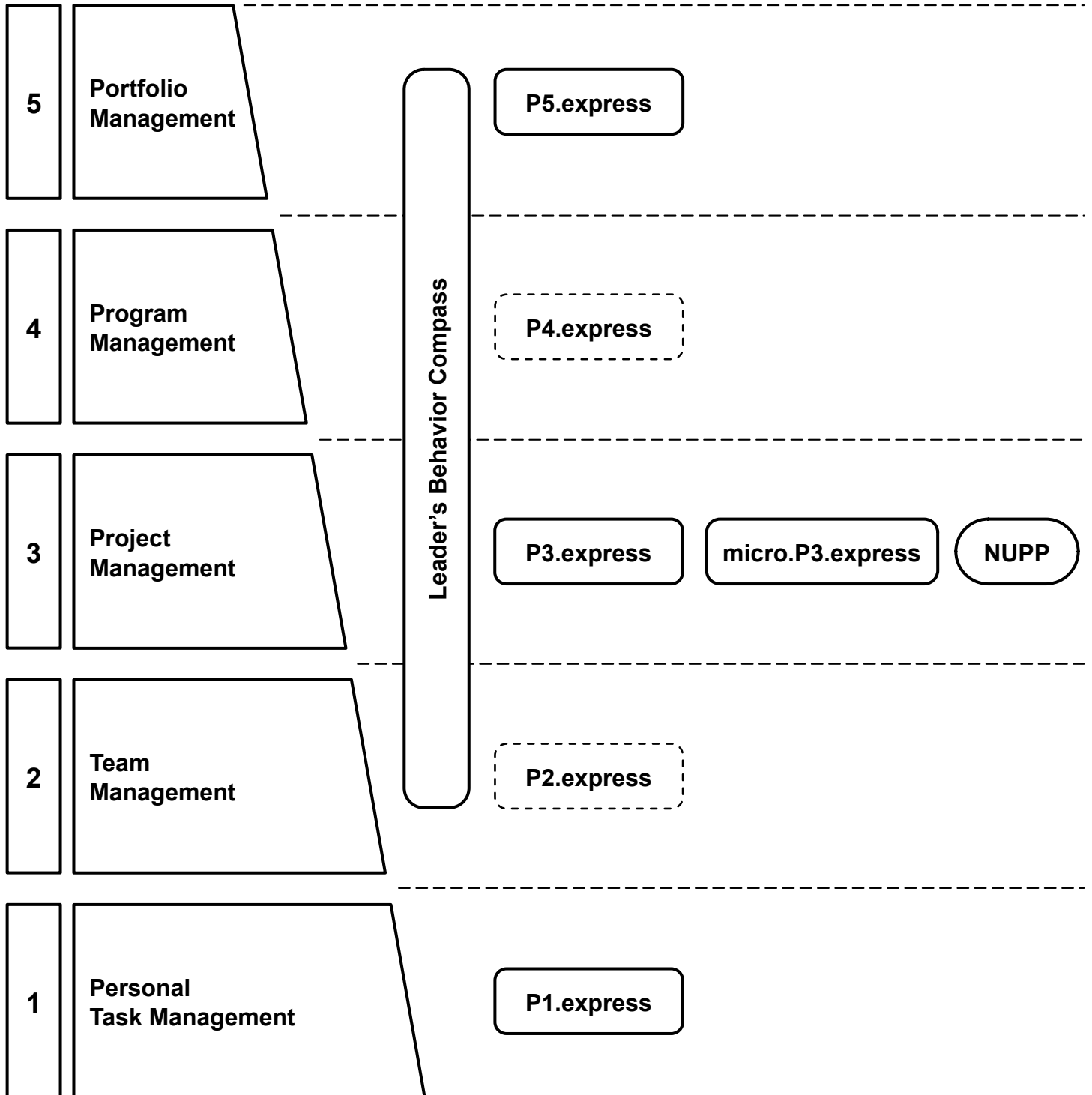
# Why portfolio management?



# Why portfolio management?



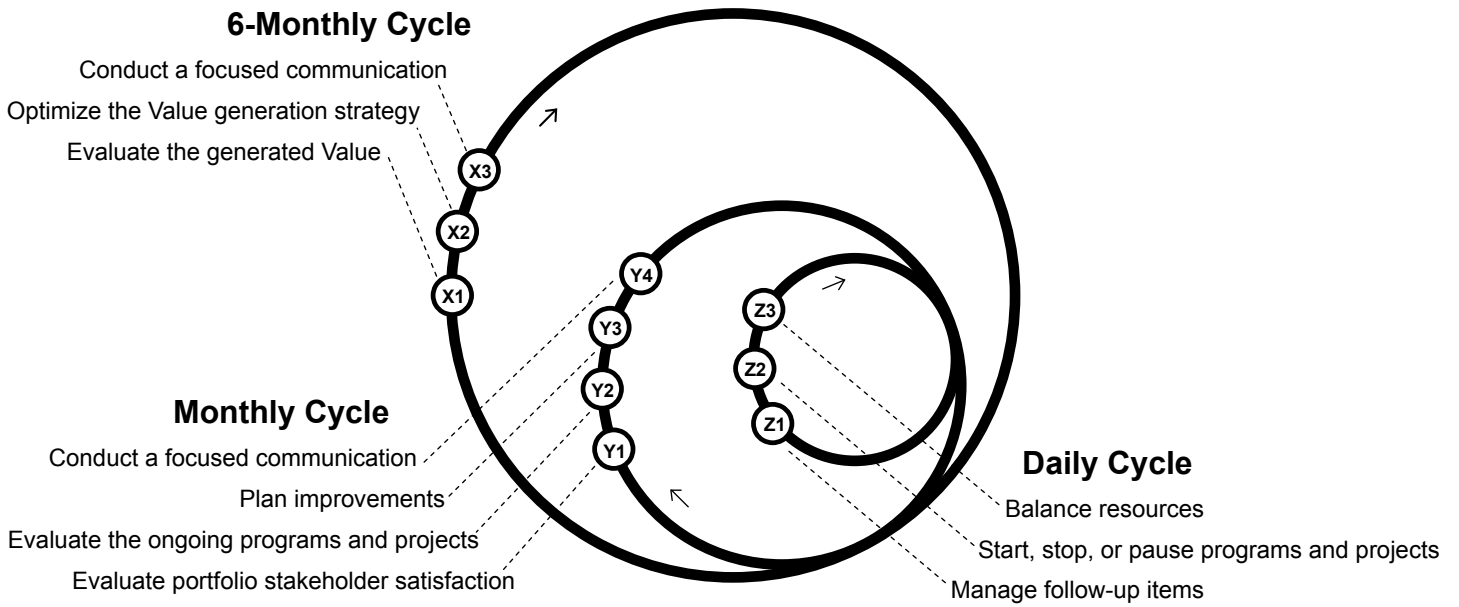
# Why portfolio management?



Part 2

# ***Process Overview***

# Process Overview



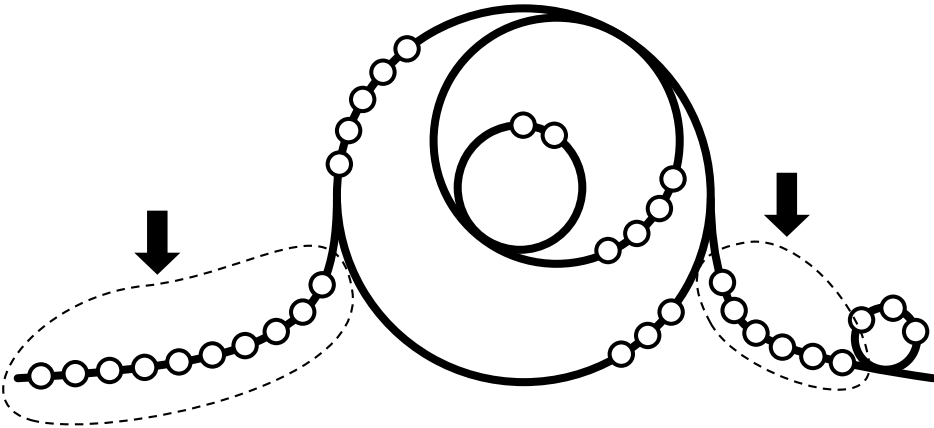
Process .....

Cycle .....

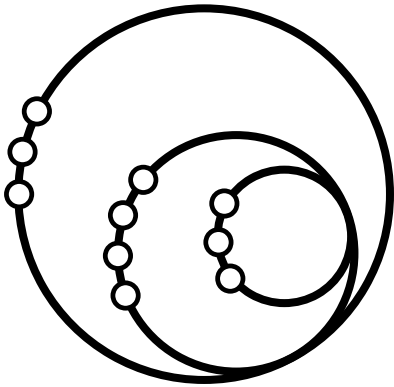
Activity group .....

Management activity .....

Process Overview



P3.express

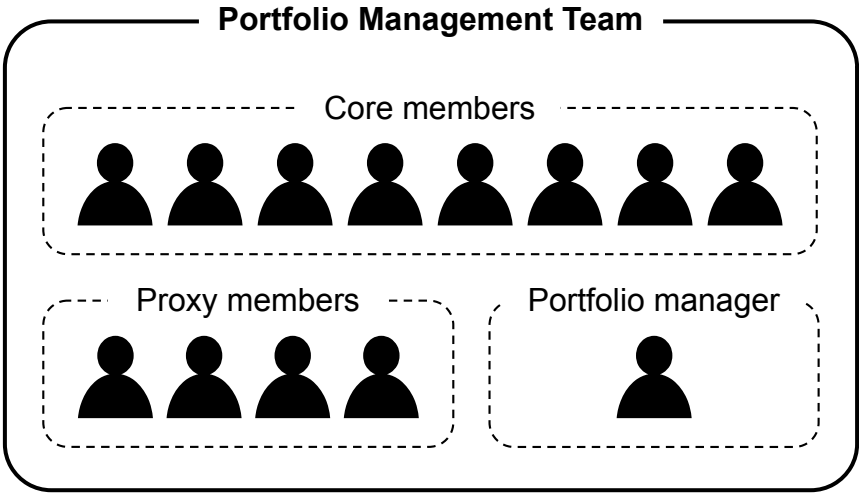


P5.express

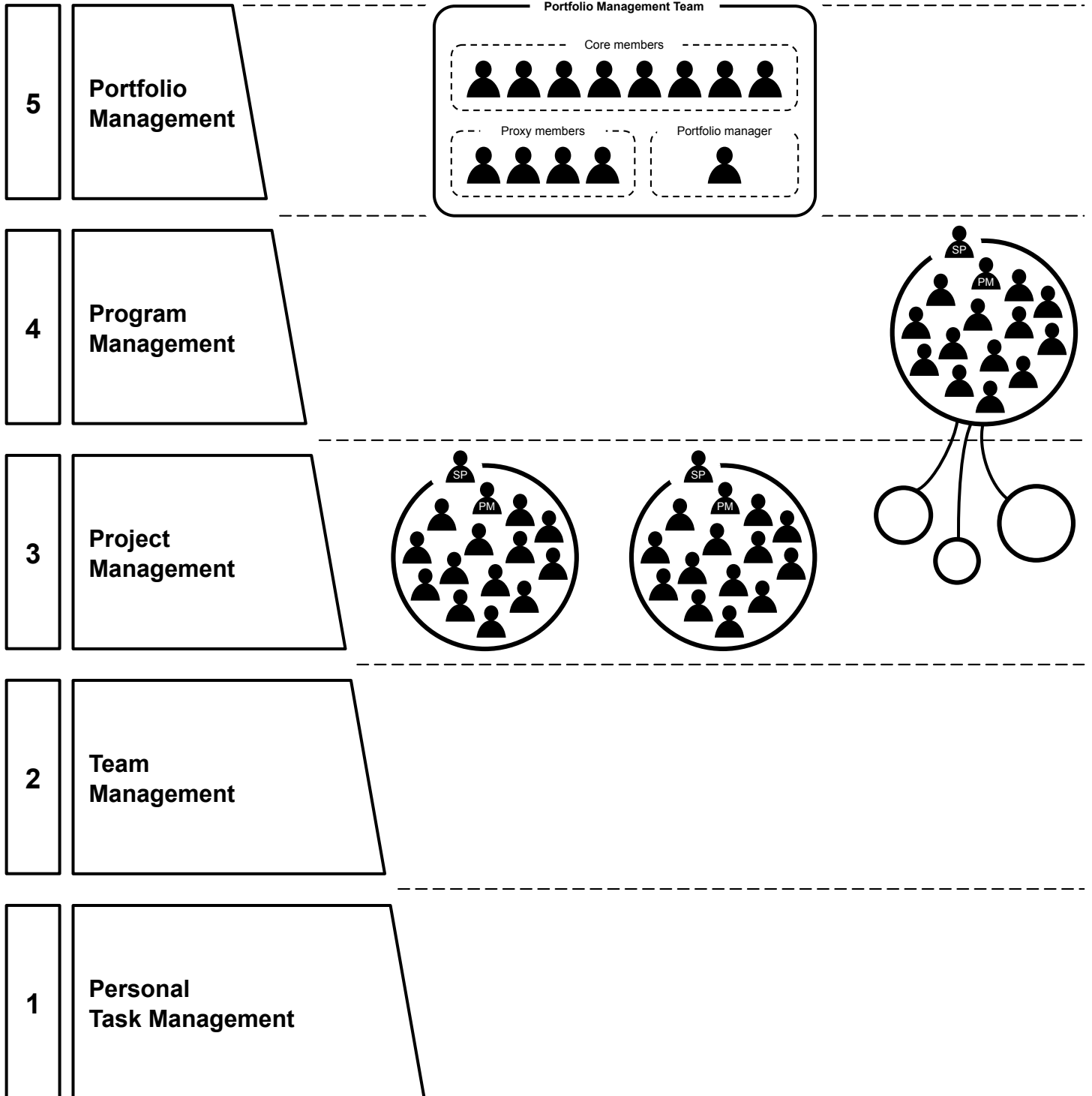
Part 3

# ***Roles Overview***

# Roles Overview

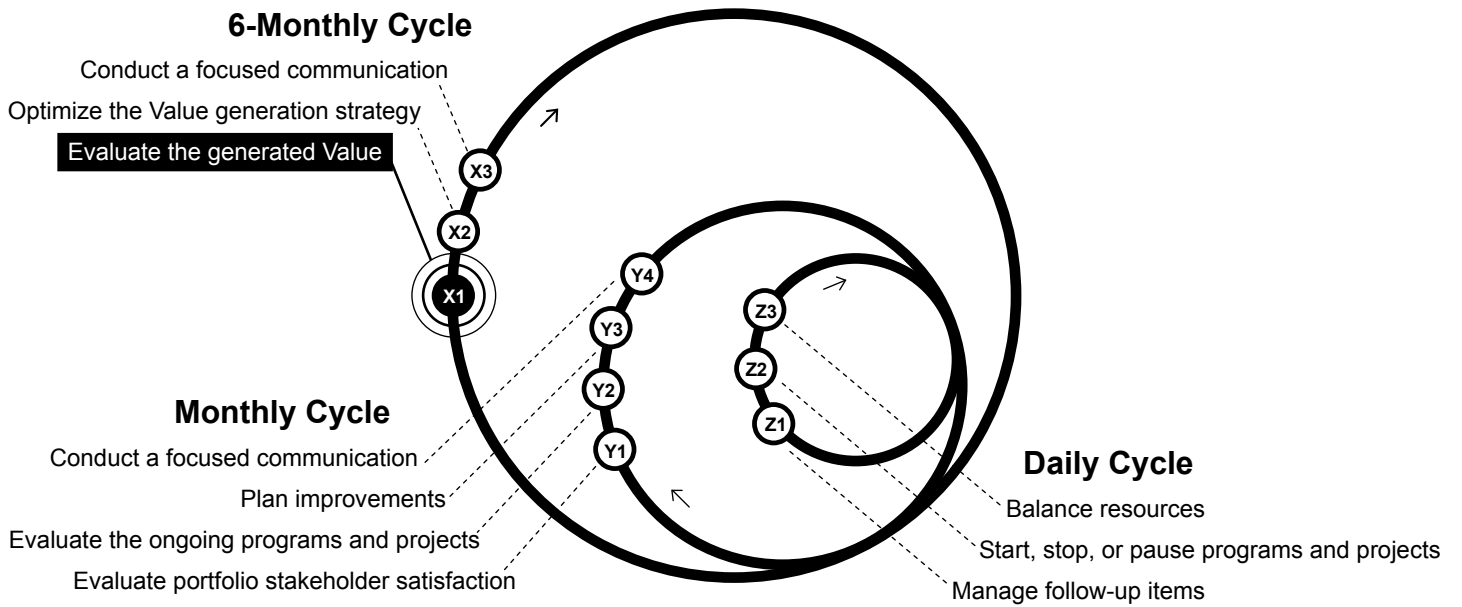


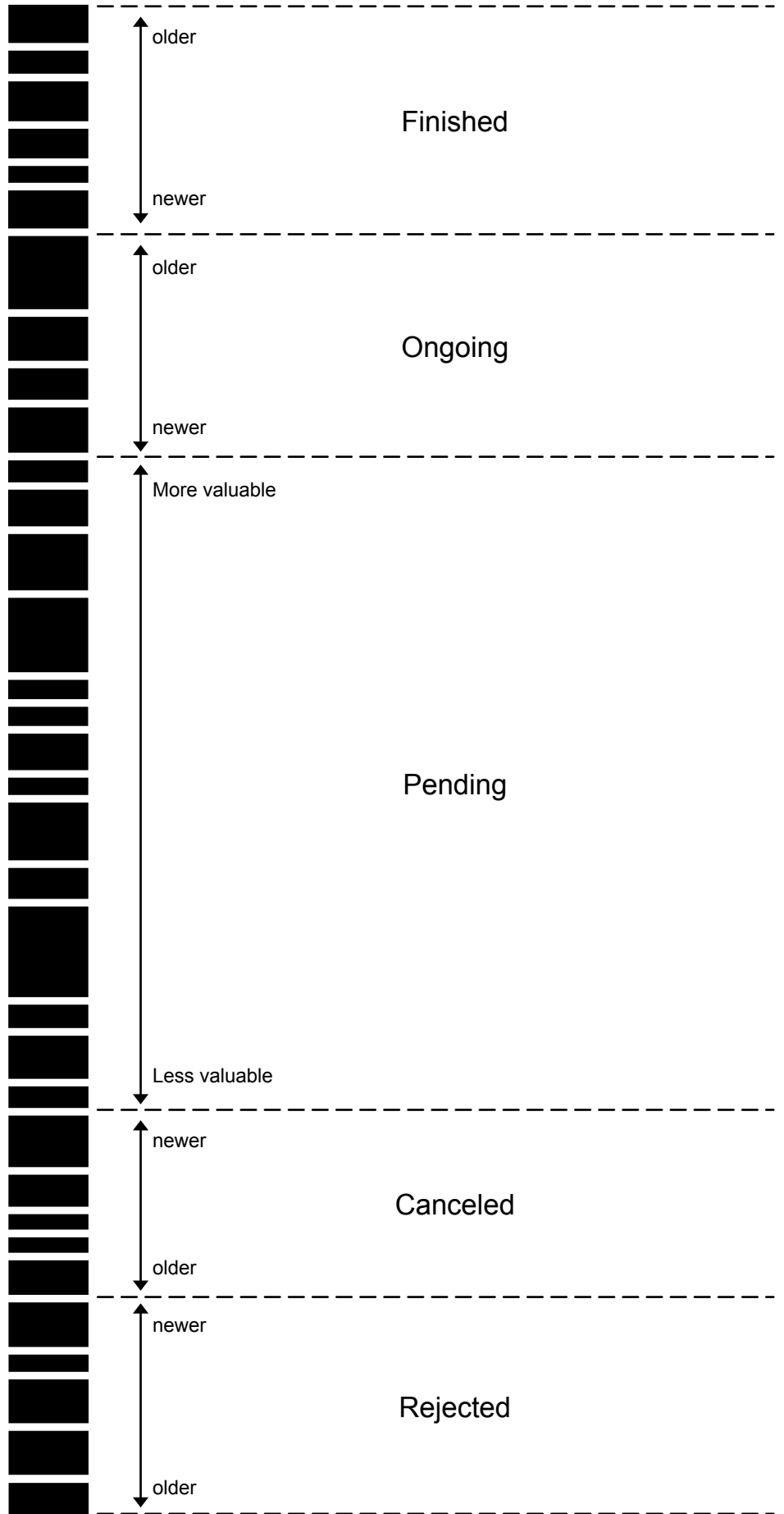
# Roles Overview

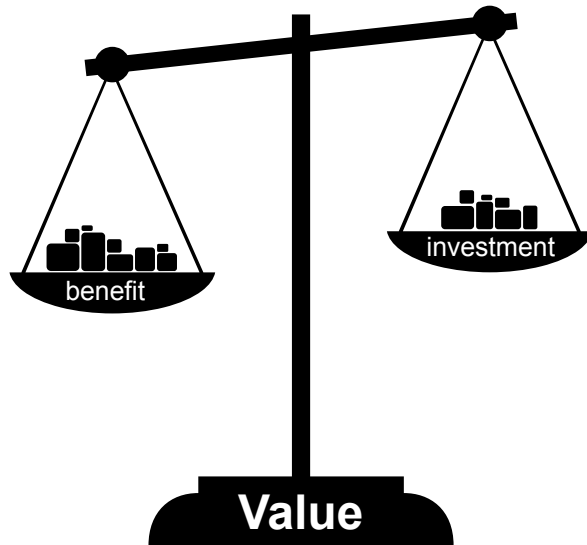


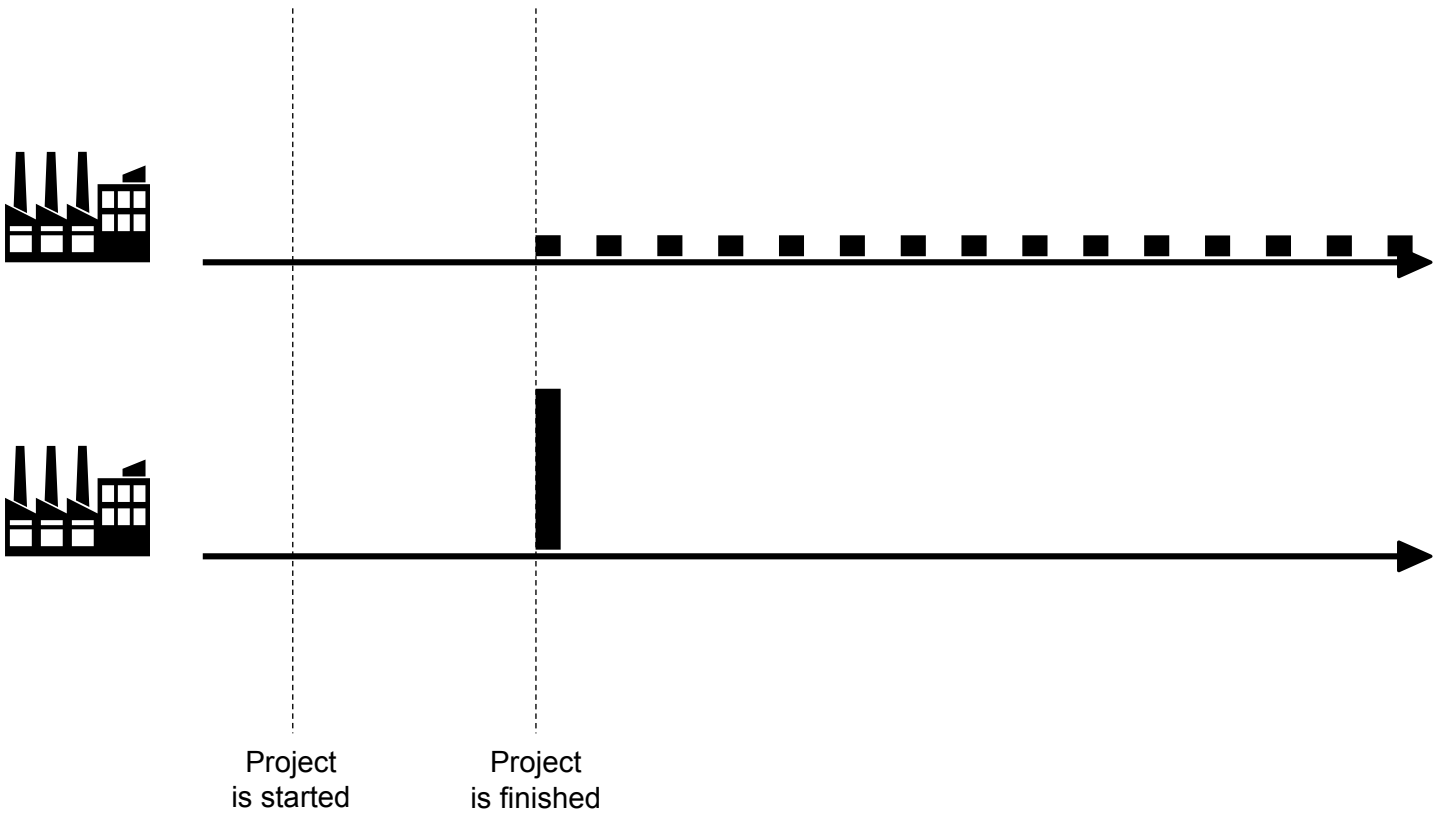
Part 4

# ***6-Monthly Cycle***

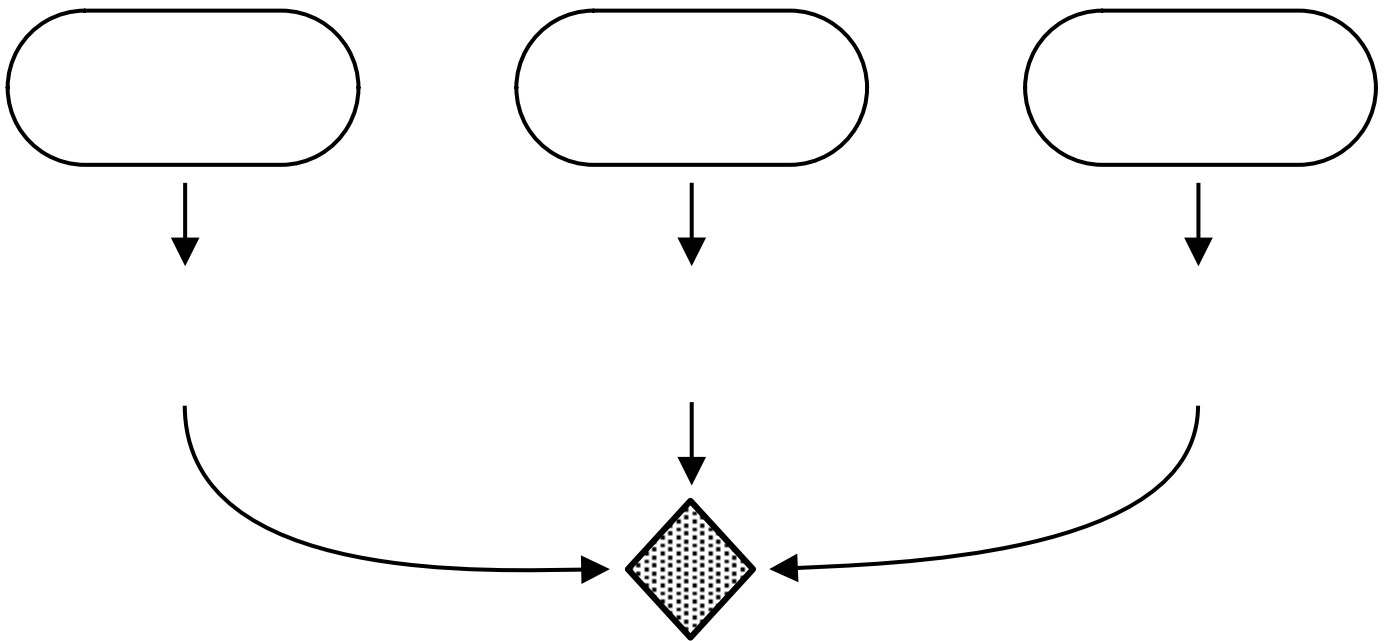


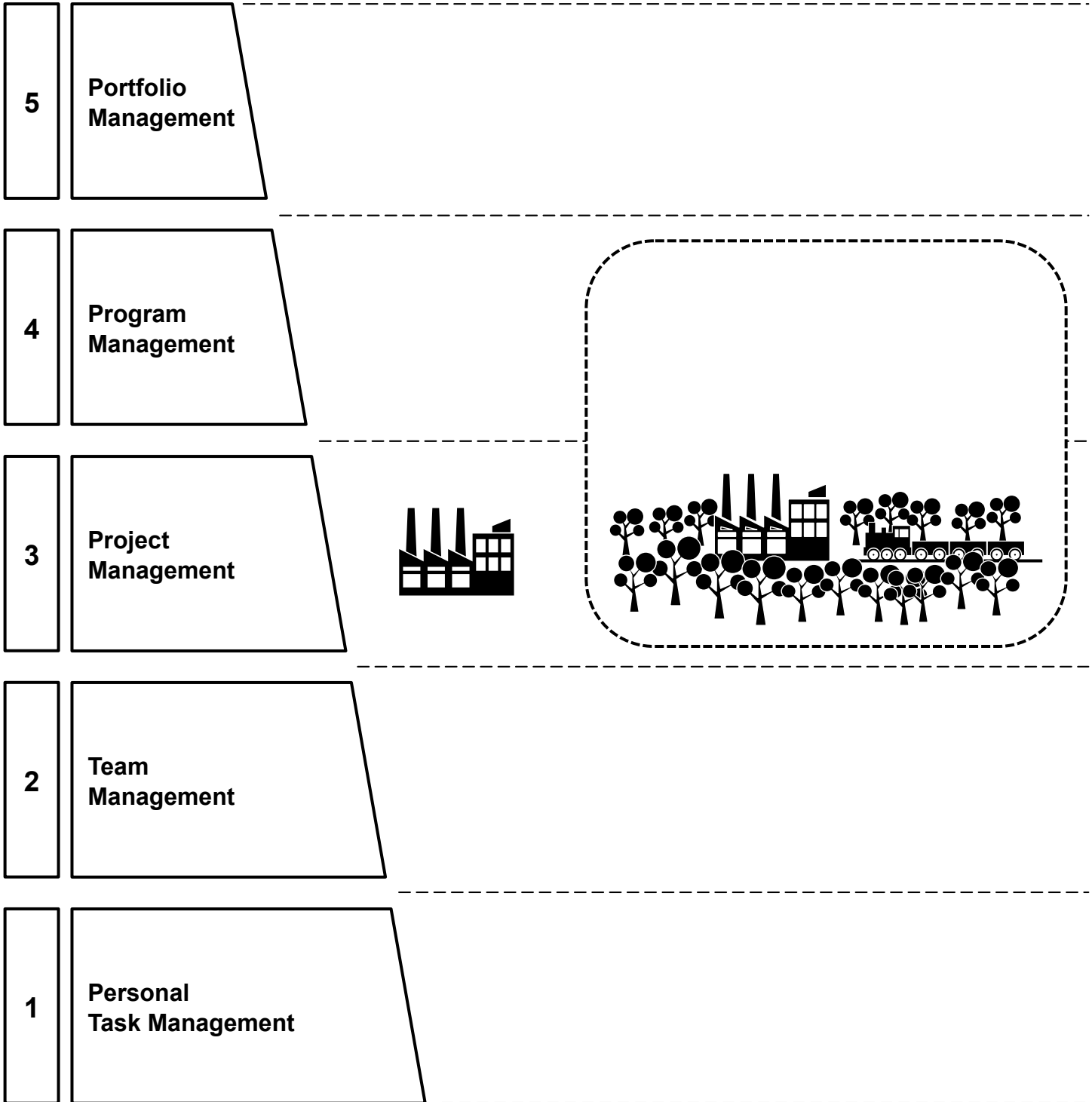


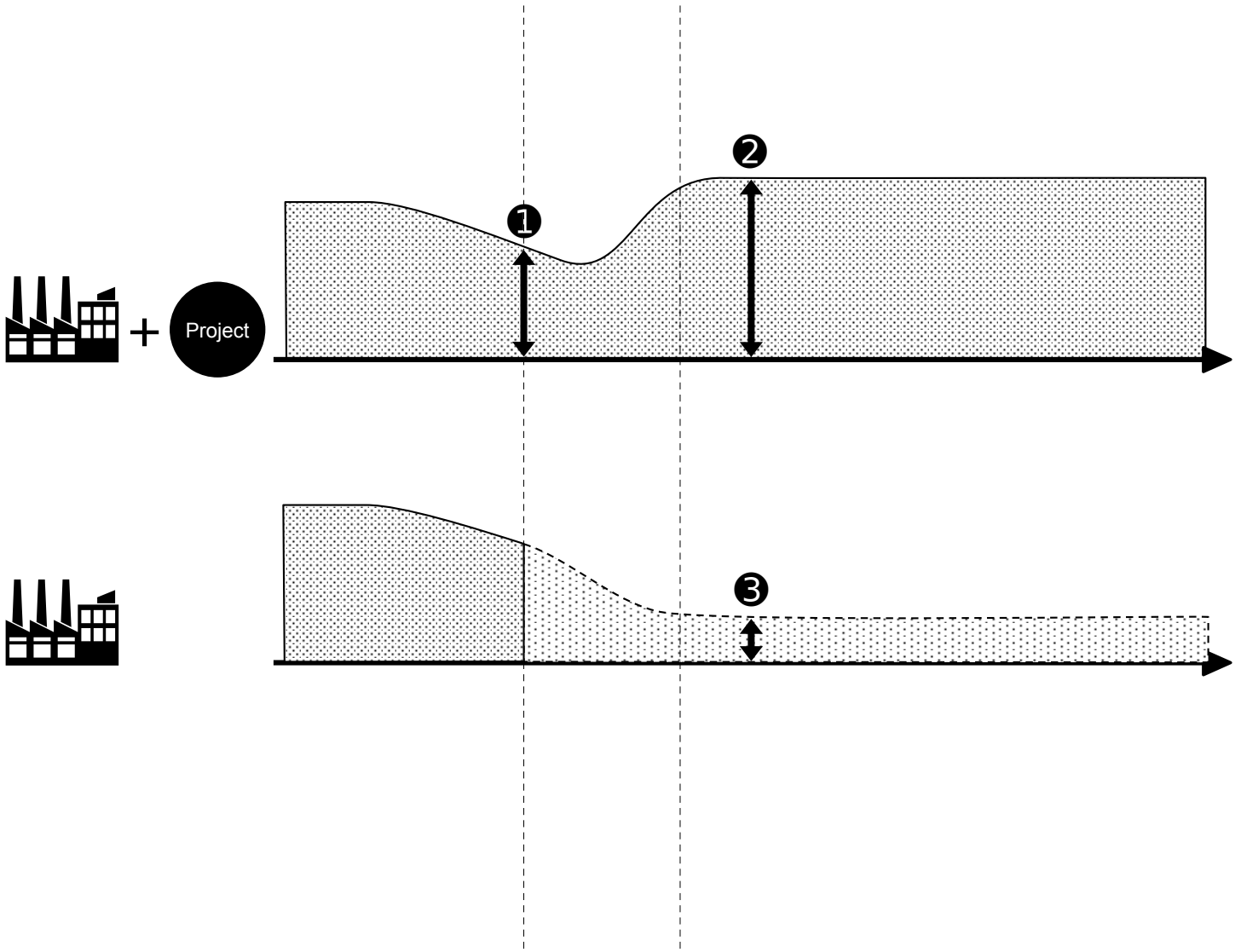


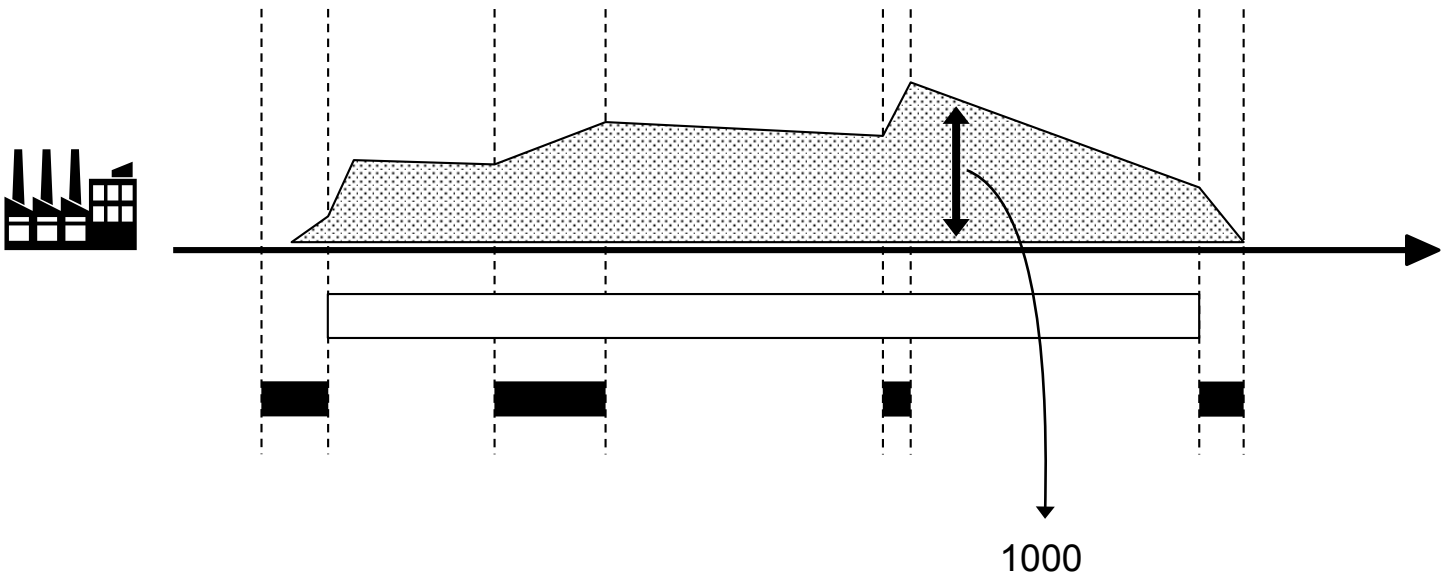


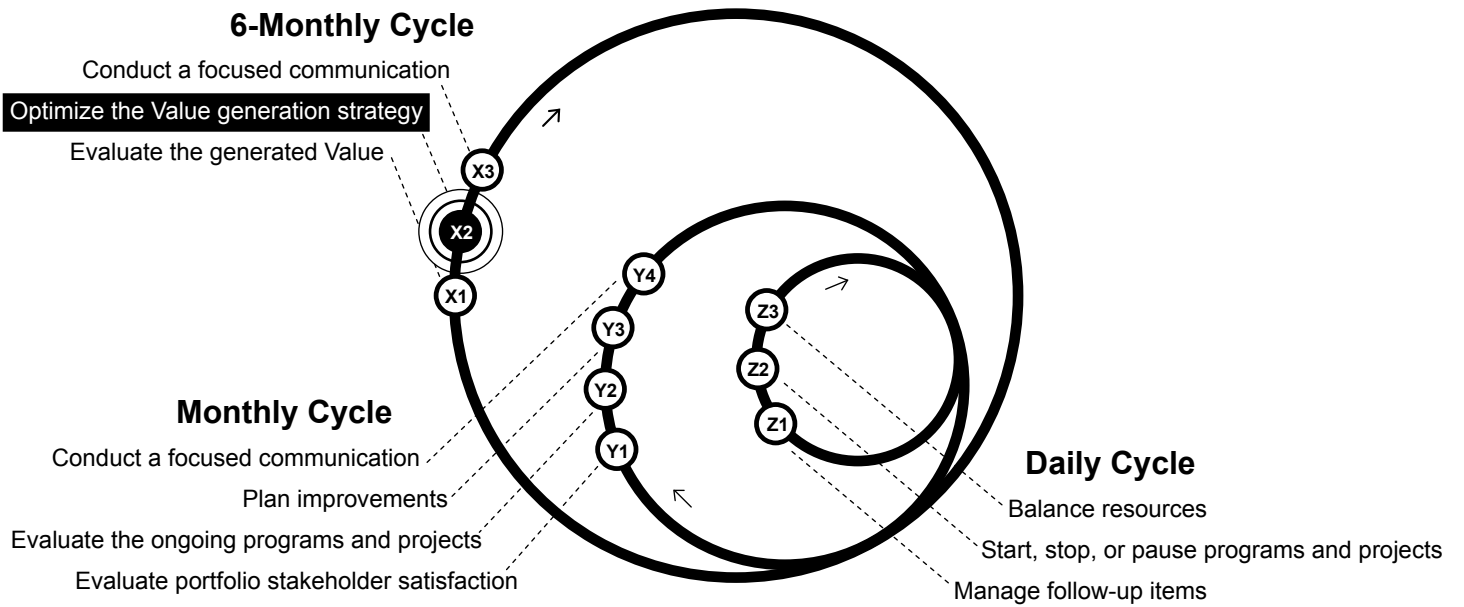
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#01	26	22	18	15	13	11	09	08	07	06	05	04
#02	42	--	--	--	--	--	--	--	--	--	--	--
#03	05	05	05	05	05	05	05	05	05	05	05	05
#04	-30	-10	20	50	90	--	--	--	--	--	--	--
#05	50	00	00	40	00	00	30	00	00	20	00	00

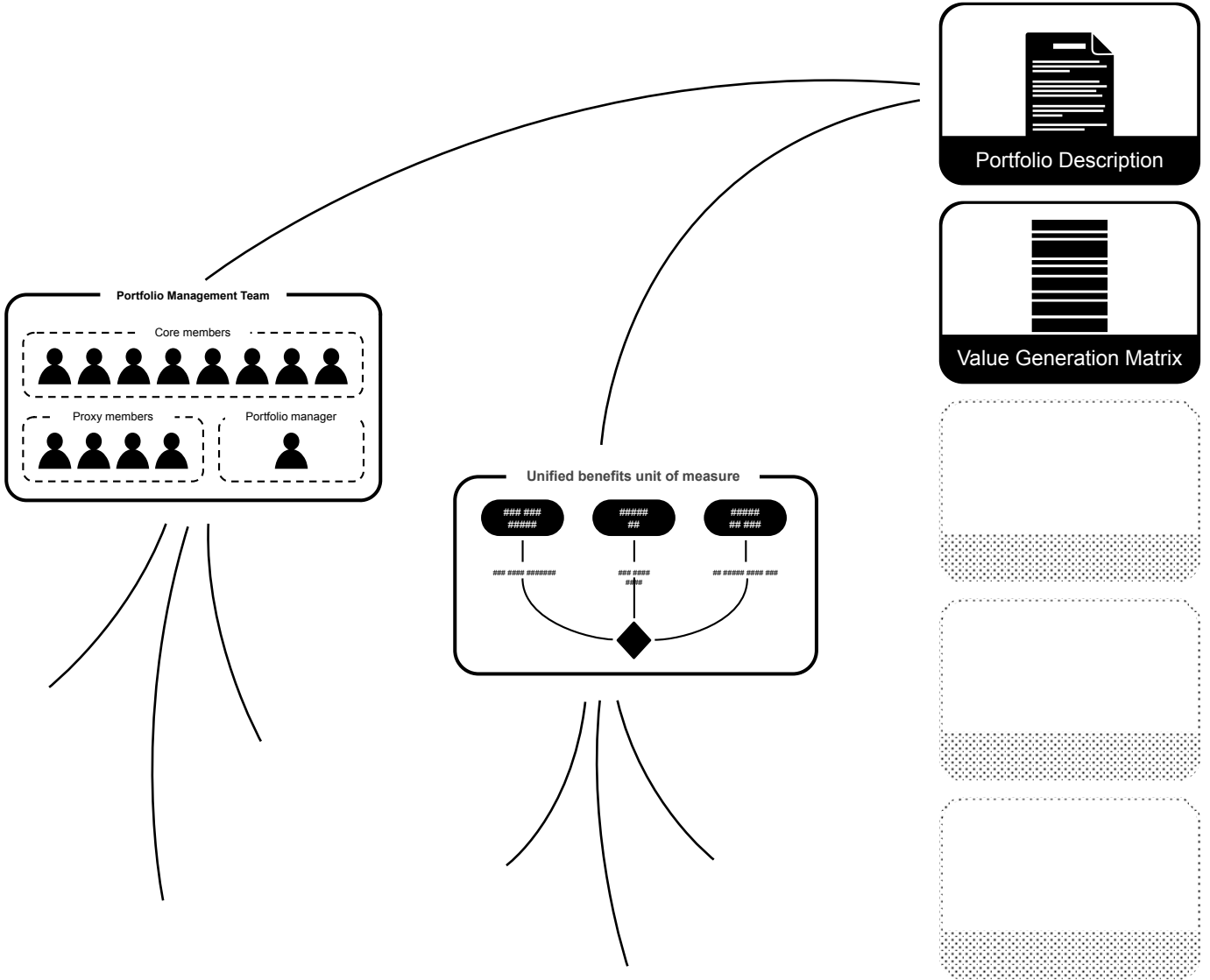


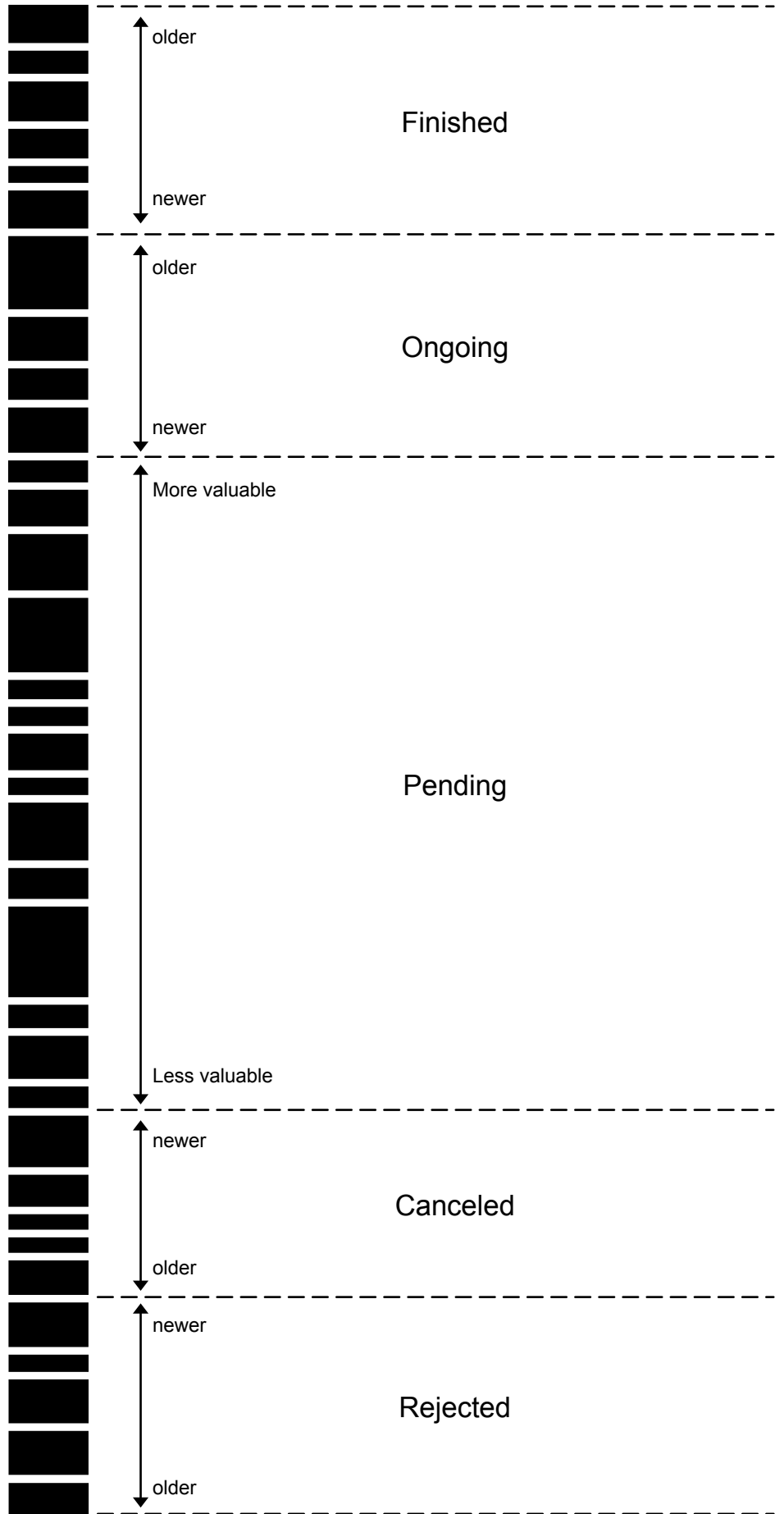


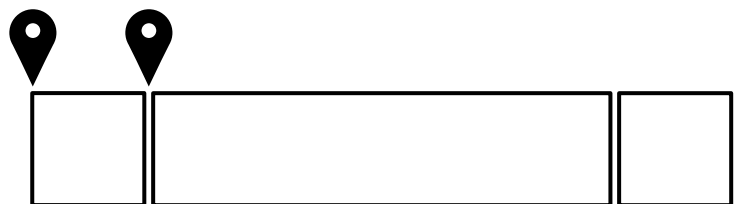
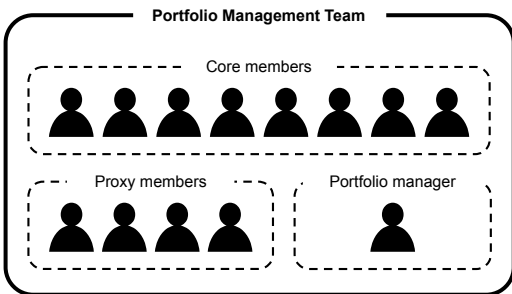
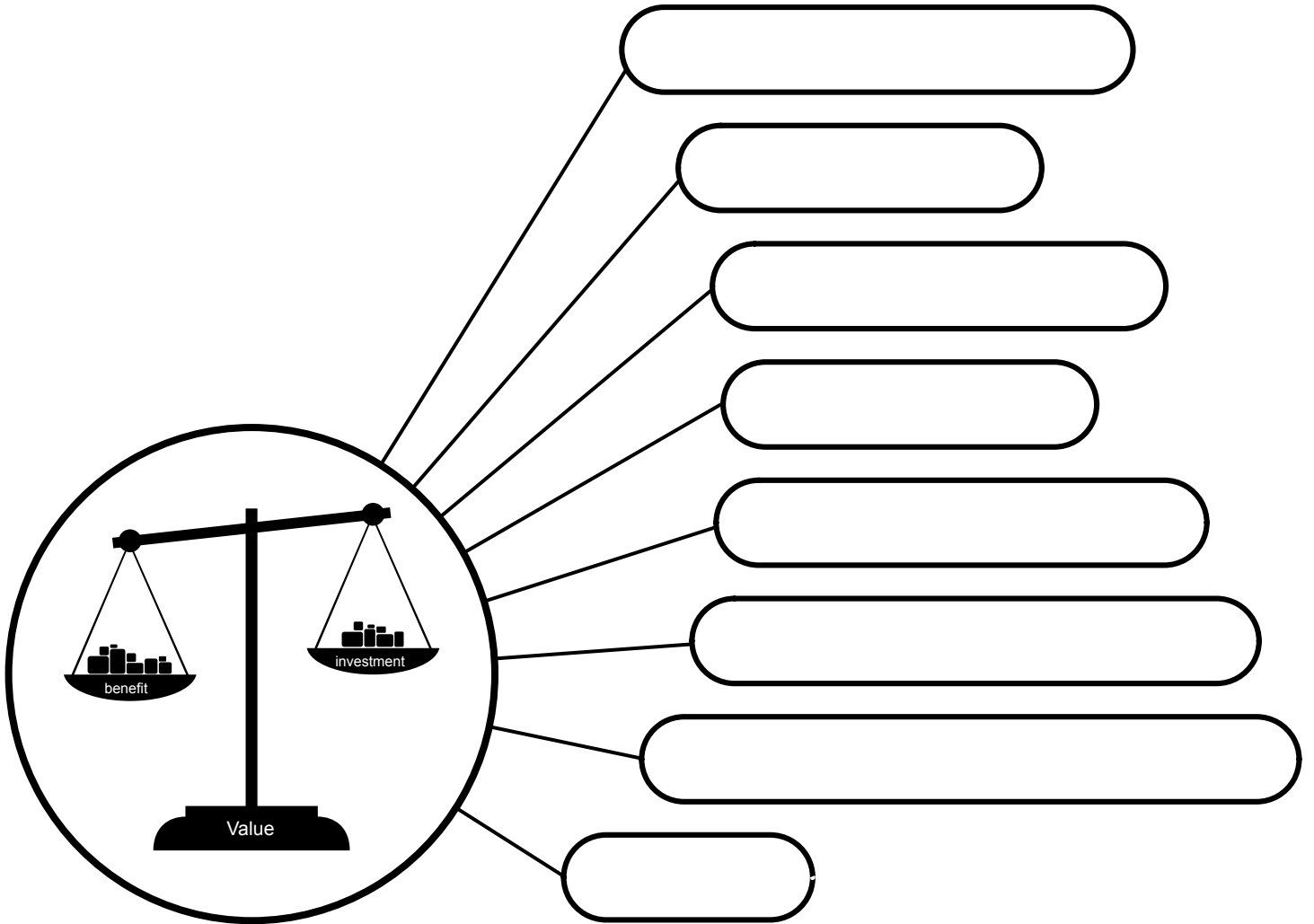


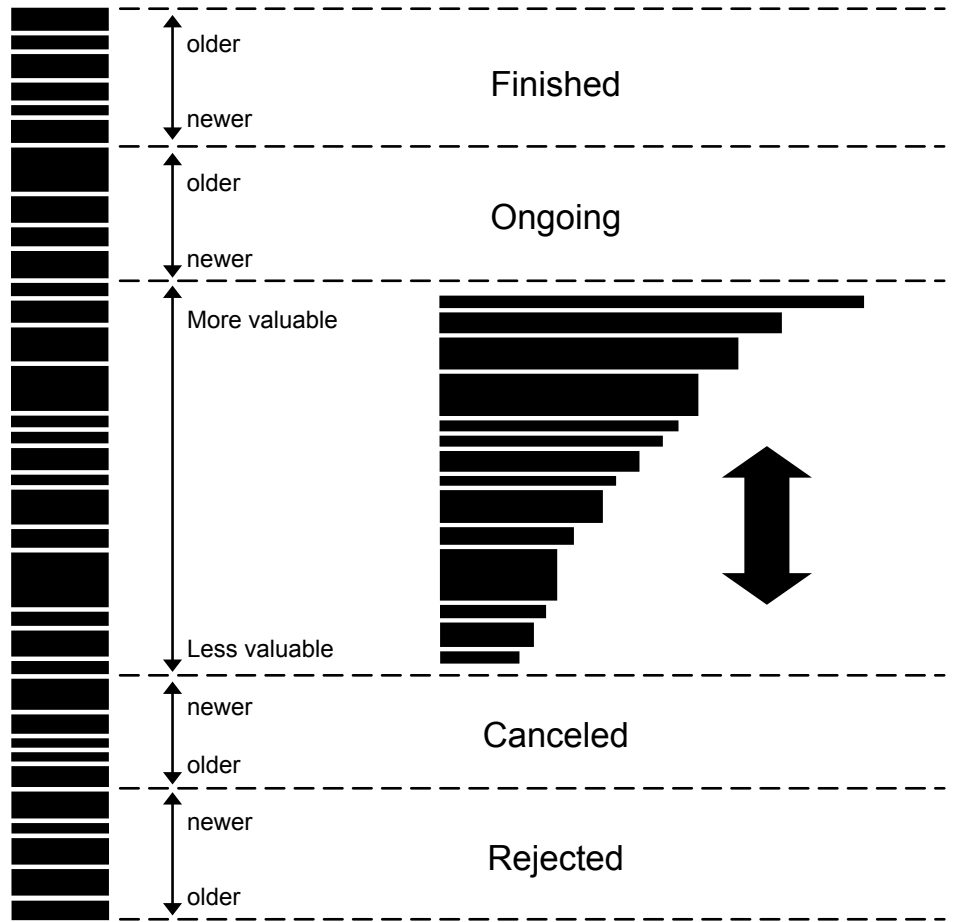




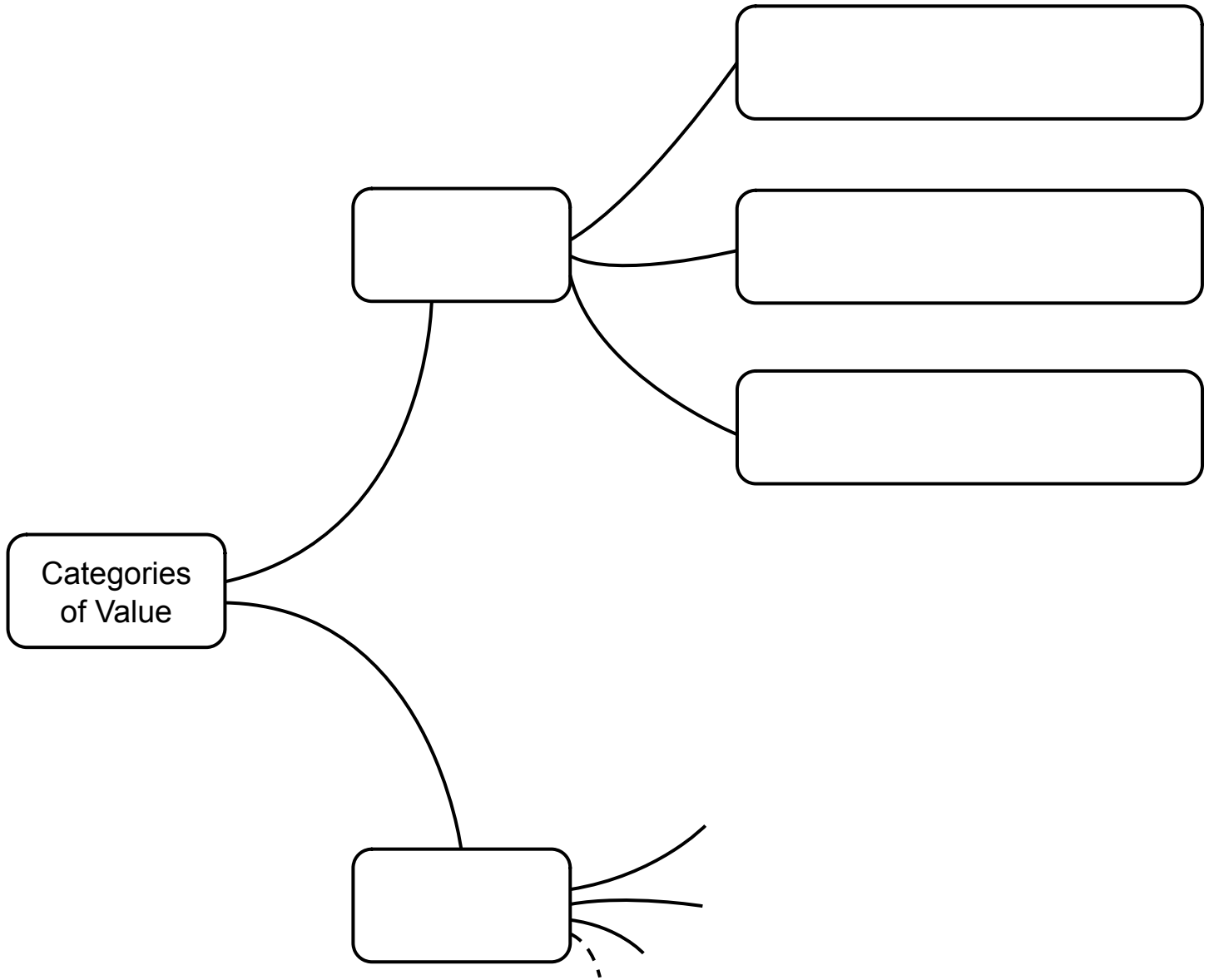


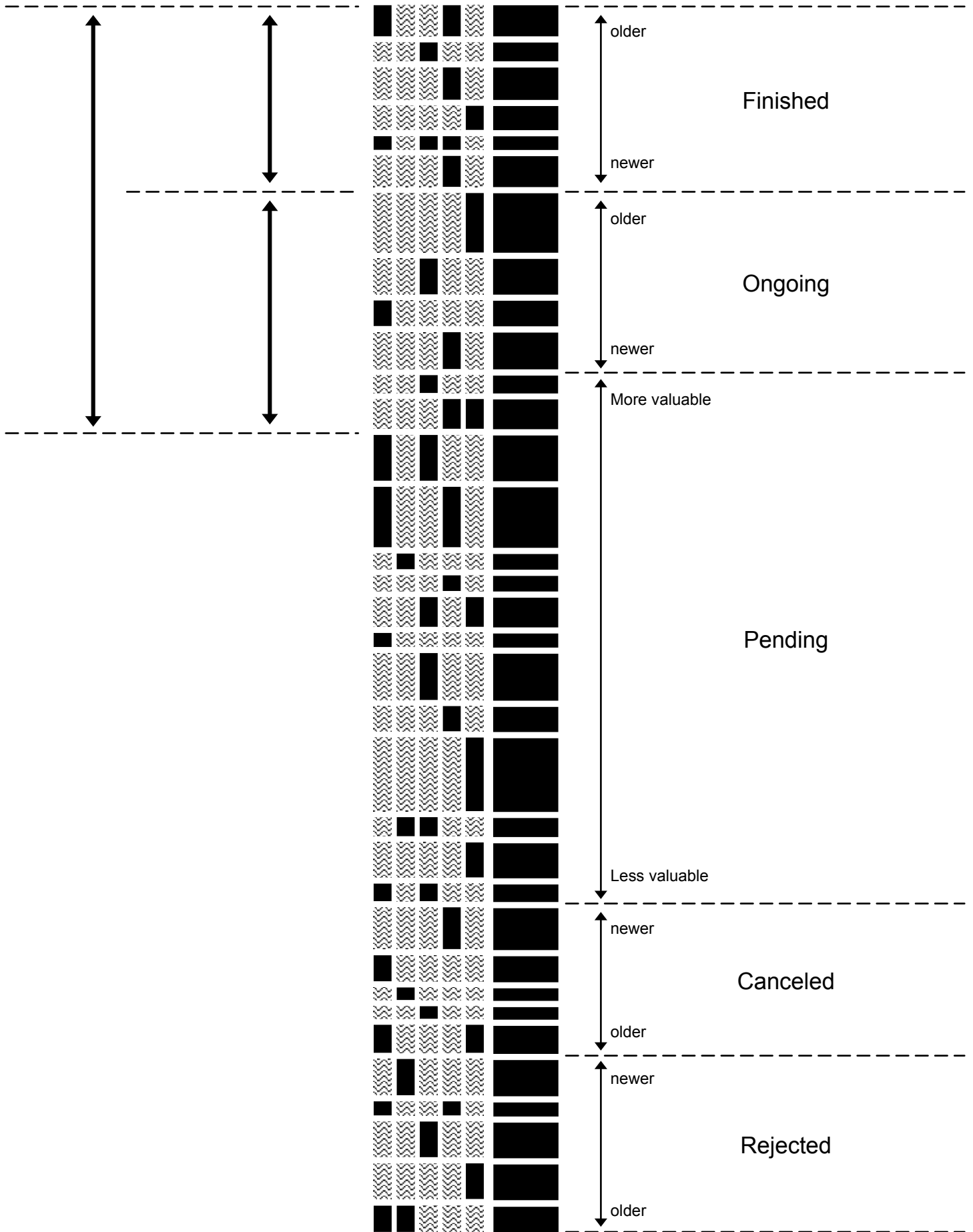




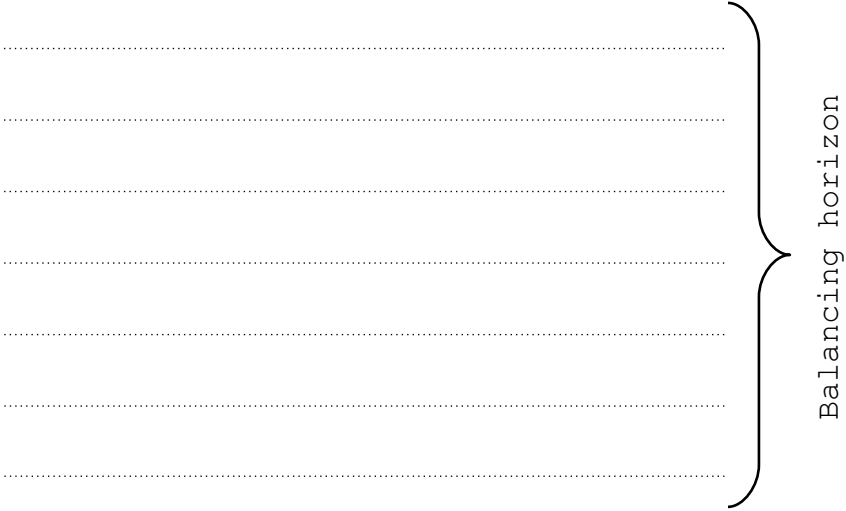


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Pa	3	7	finished
Pb	6	7	finished
Pc	4	6	ongoing
Pd	8	9	ongoing
Pe	3	4	ongoing
Pf	2	5	pending
Pg	8	9	pending
Ph	4	6	pending
Pi	2	5	pending
Pj	6	7	pending
Pk	4	5	pending
Pl	7	6	canceled
Pm	5	4	rejected
Pn	4	4	rejected





Title	Investment	Benefits	Value	Status	Value category A	Value category B	Value category C
Pa	3	7	2.3	f	0	1	0
Pb	6	7	1.2	f	0	0	1
Pc	4	6	1.5	o	1	0	0
Pd	8	9	1.1	o	0	1	0
Pe	3	4	1.3	o	0	1	0
Pf	2	5	2.5	p	0	1	0
Pi	2	5	2.5	p	1	0	0
Ph	4	6	1.5	p	1	0	0
Pk	4	5	1.3	p	0	0	1
Pj	6	7	1.2	p	0	1	0
Pg	8	9	1.1	p	0	1	0
Pl	7	6	0.9	c	1	0	0
Pm	5	4	0.8	r	0	0	1
Pn	4	4	1.0	r	0	1	0



f: finished  
o: ongoing  
p: pending  
c: canceled  
r: rejected

01

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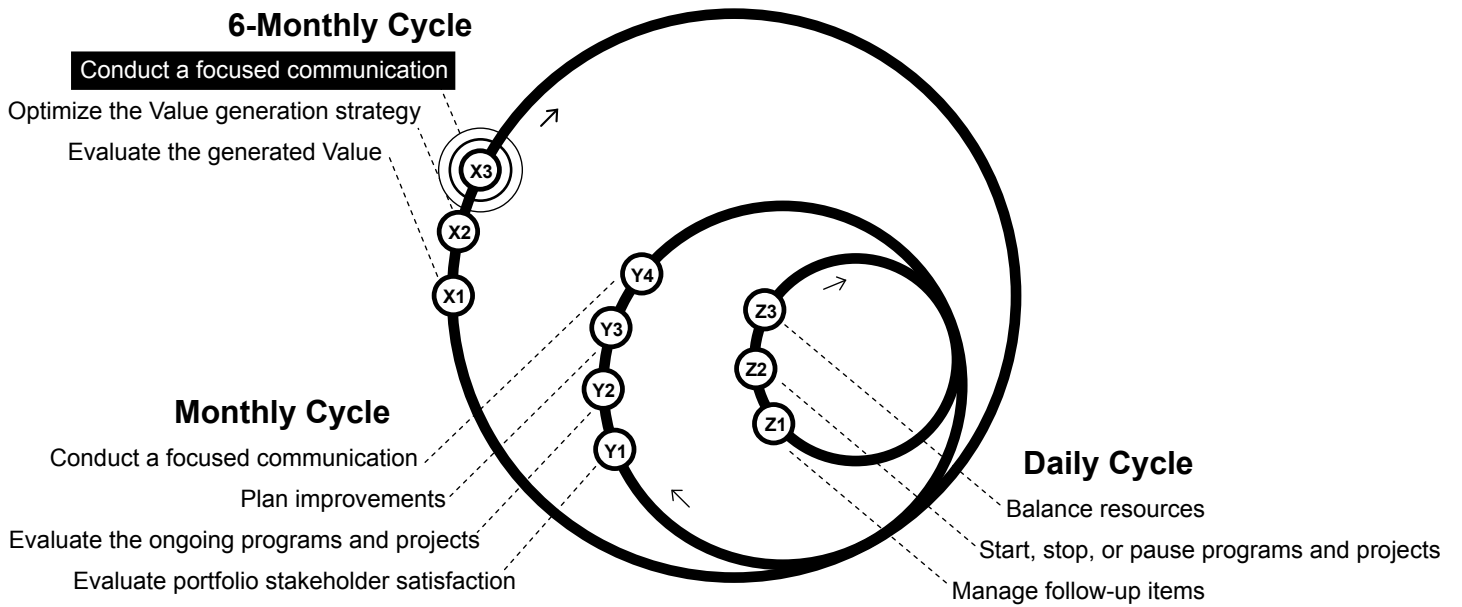
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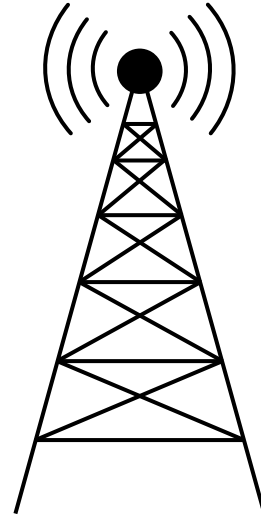
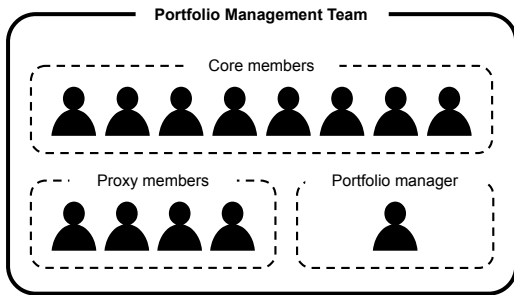
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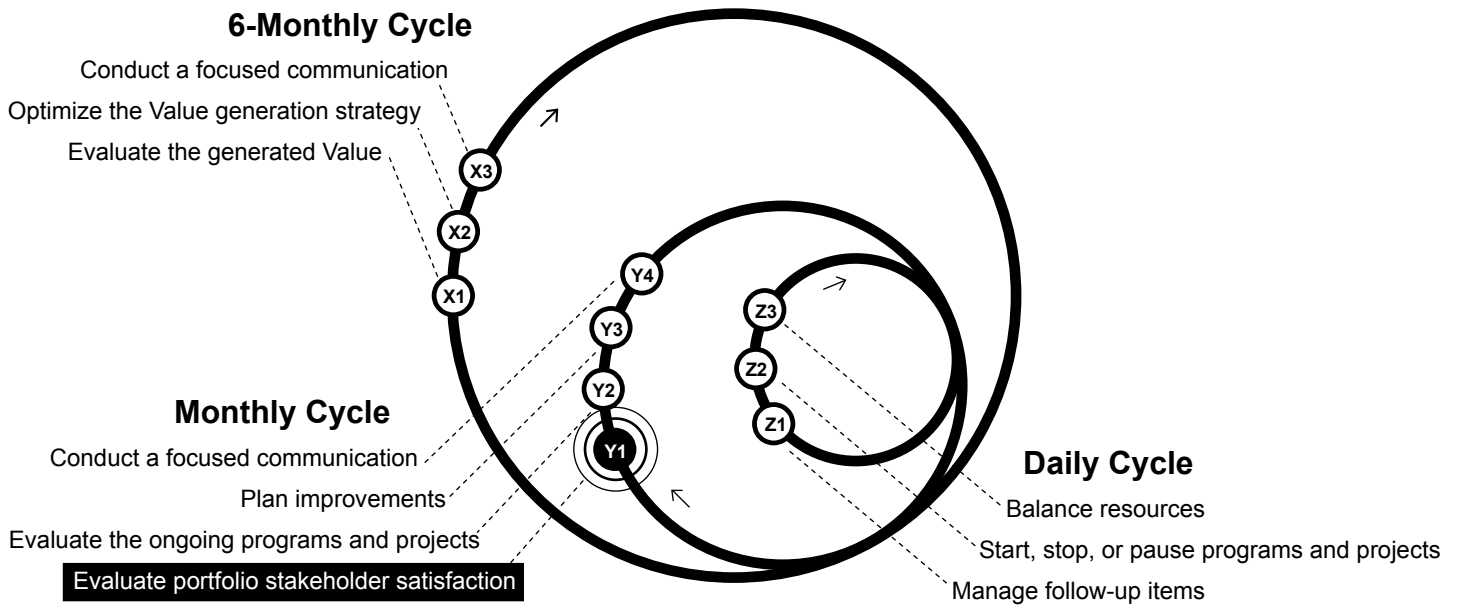
Purpose .....

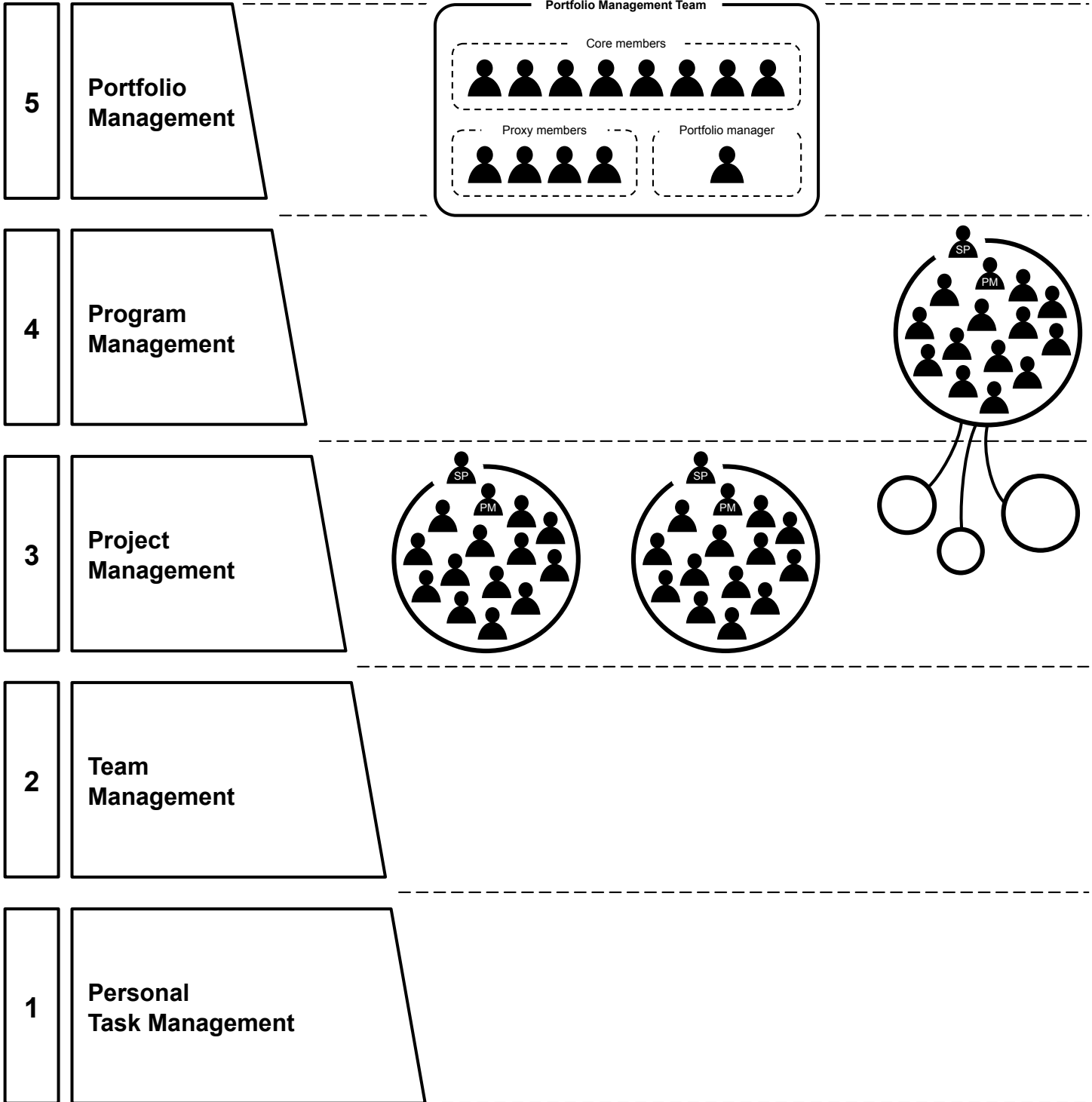
Message .....

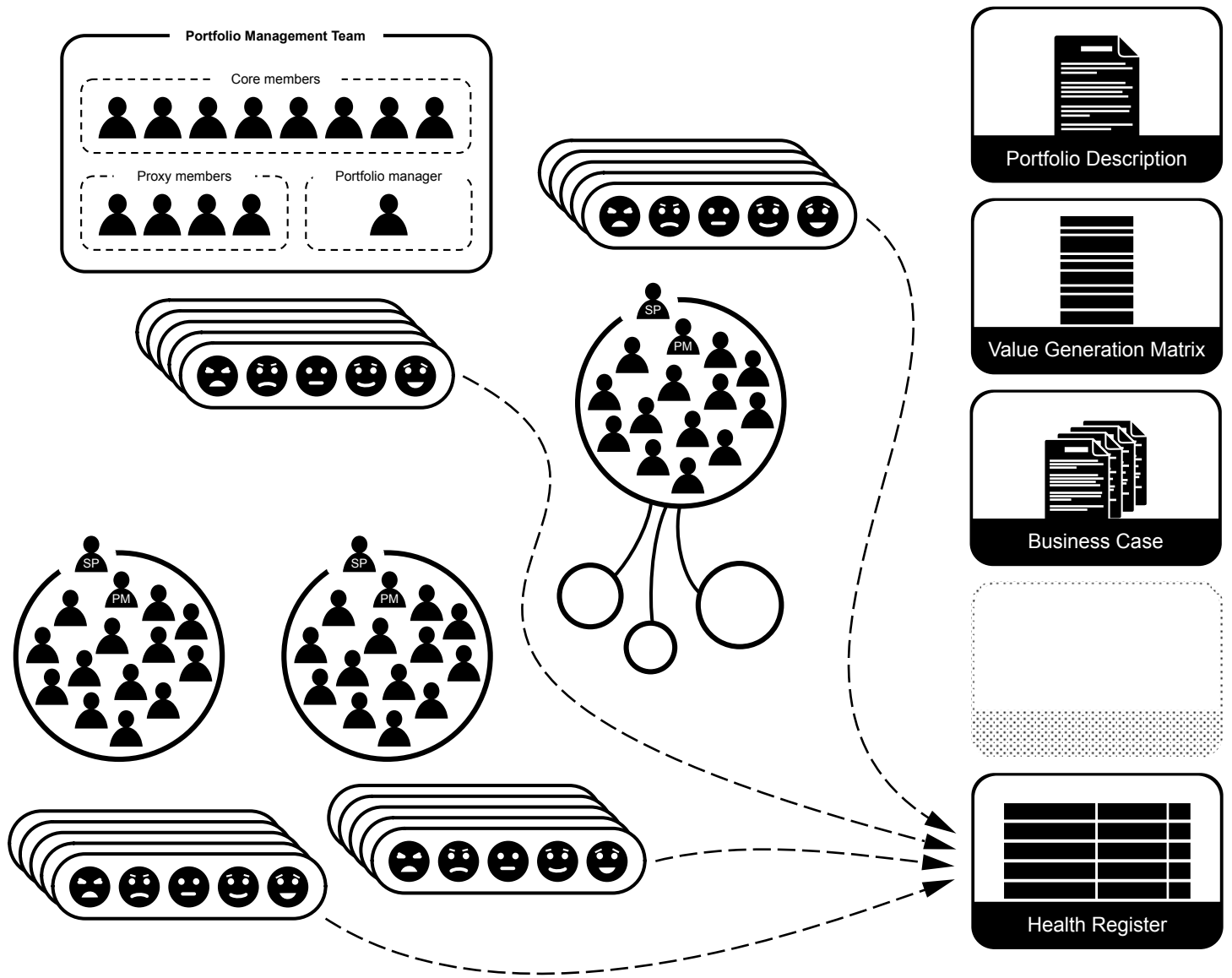
Audience .....

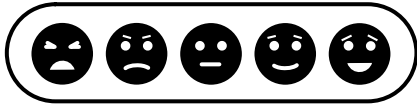
Part 5

# ***Monthly Cycle***

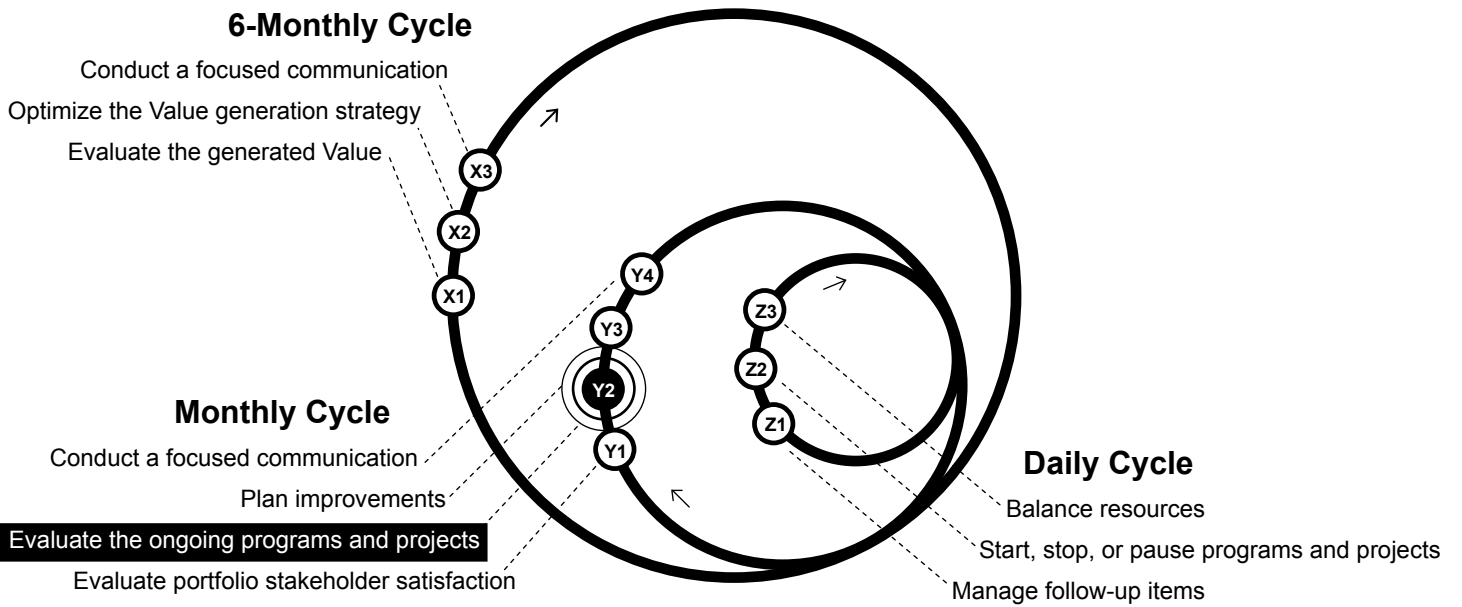


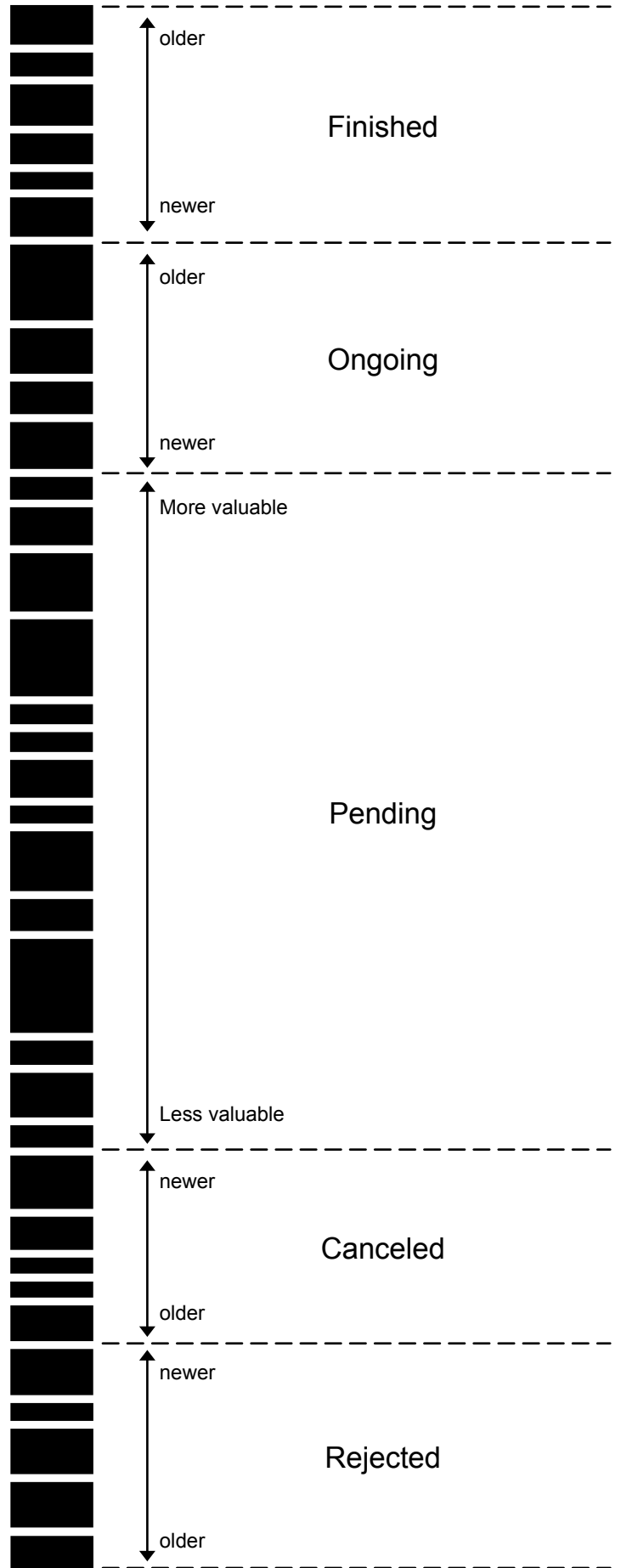
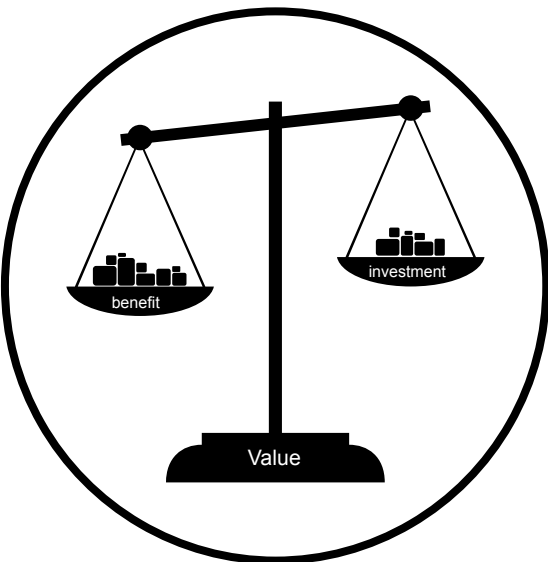
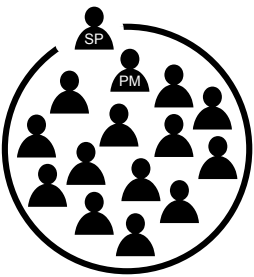
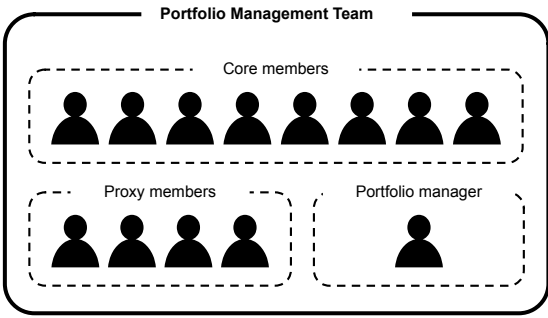


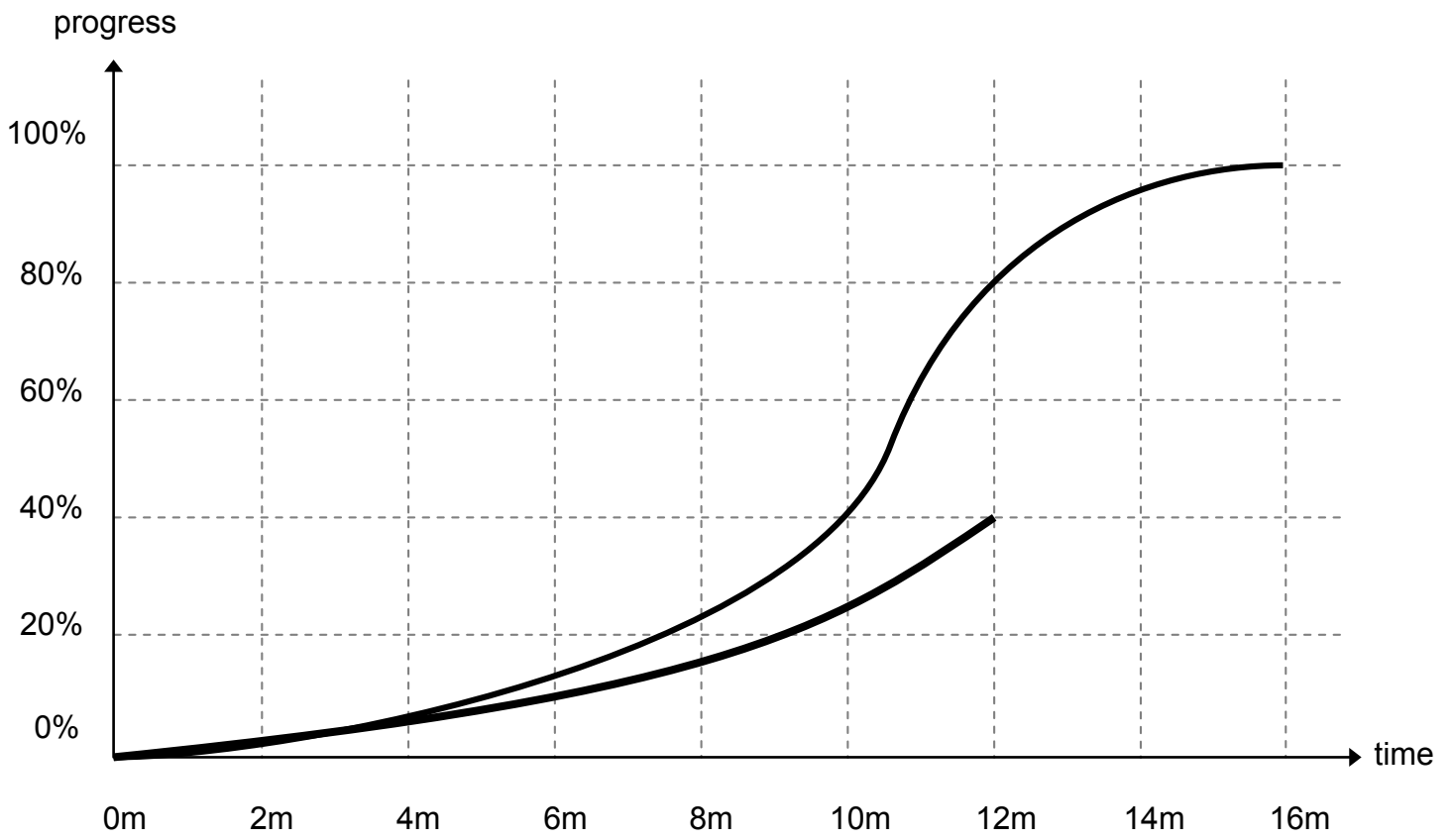


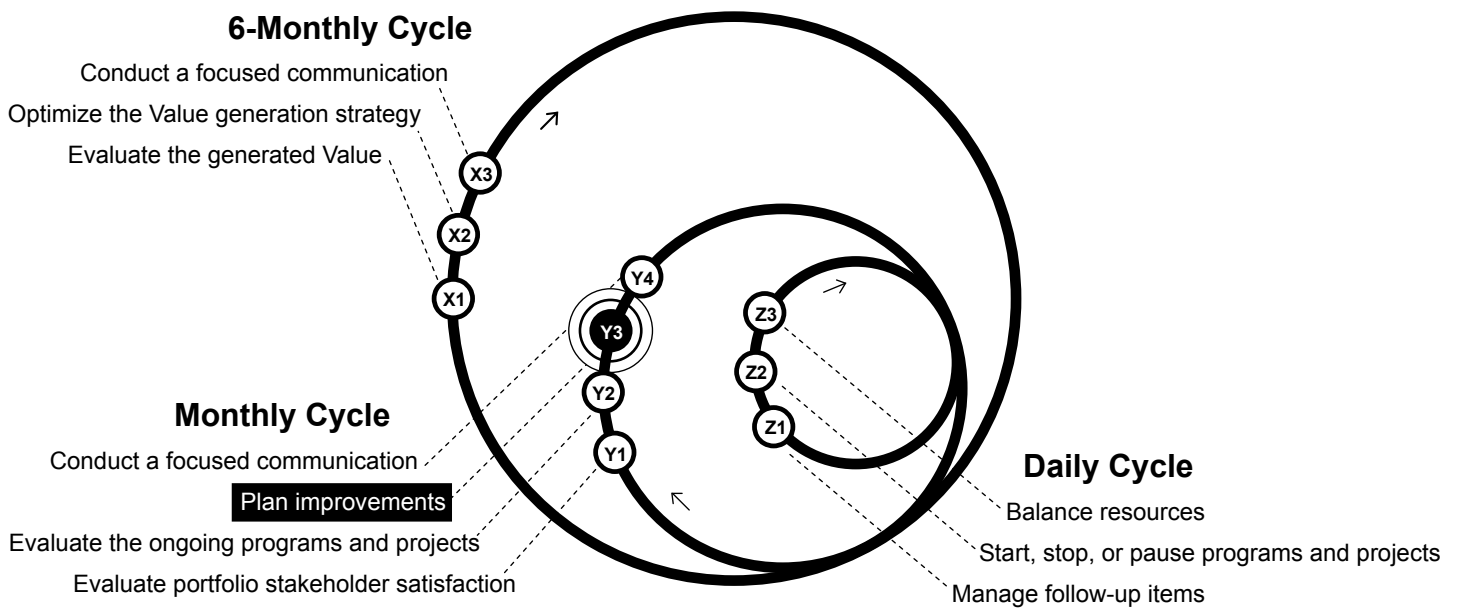


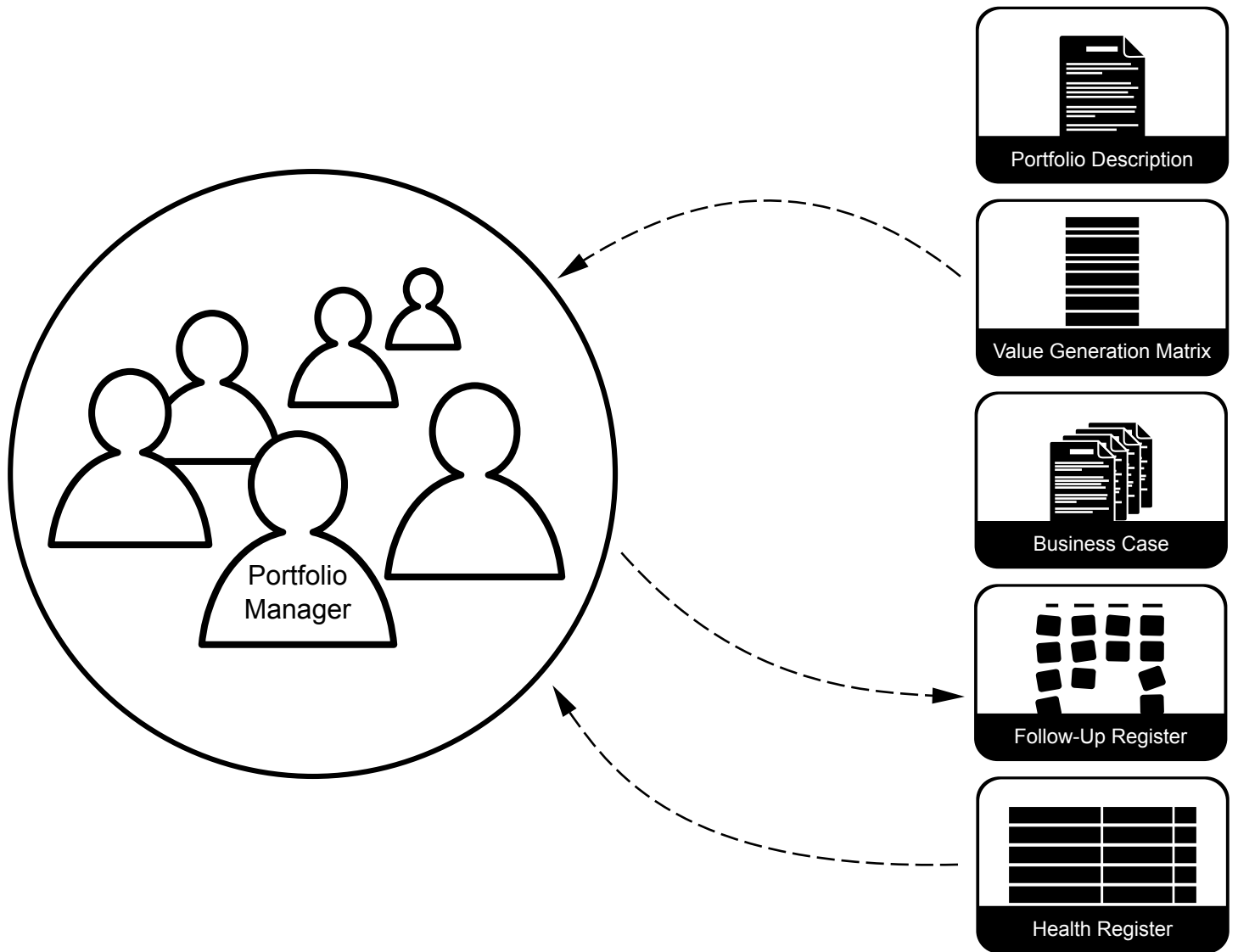
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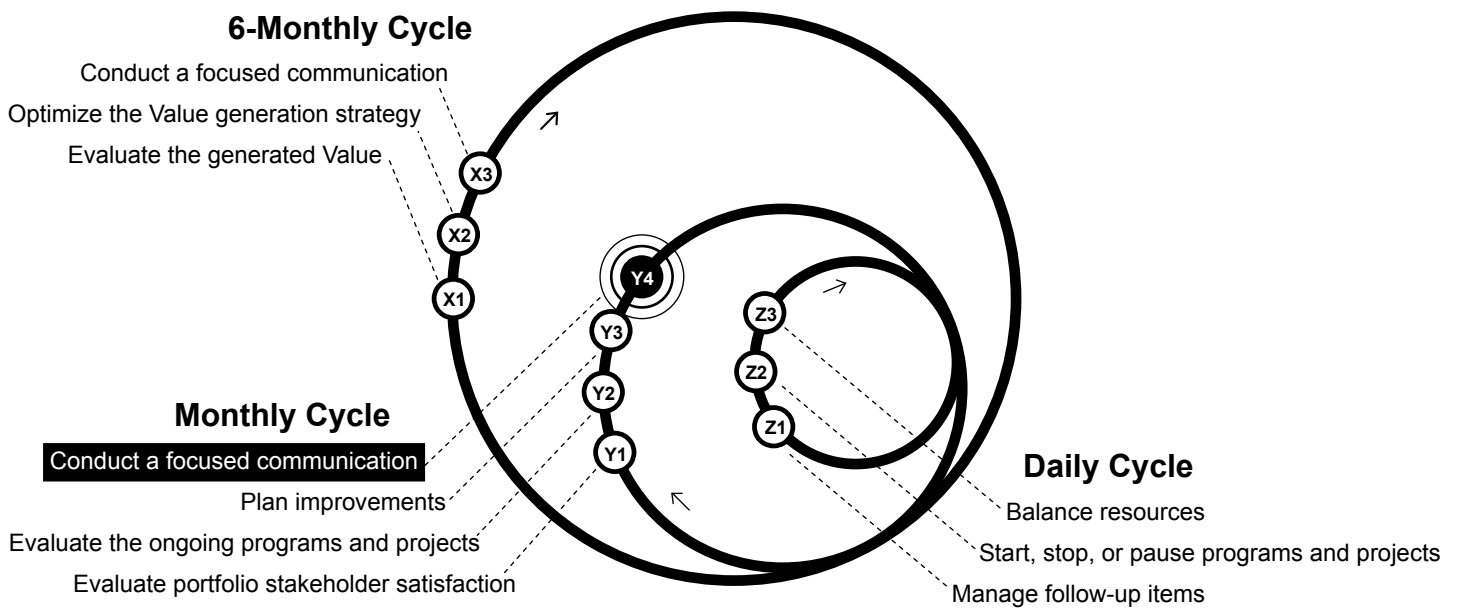


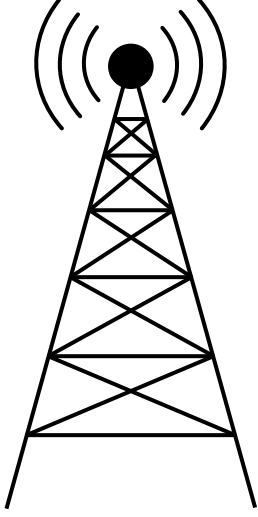
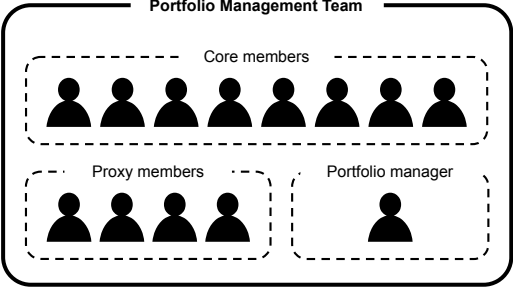












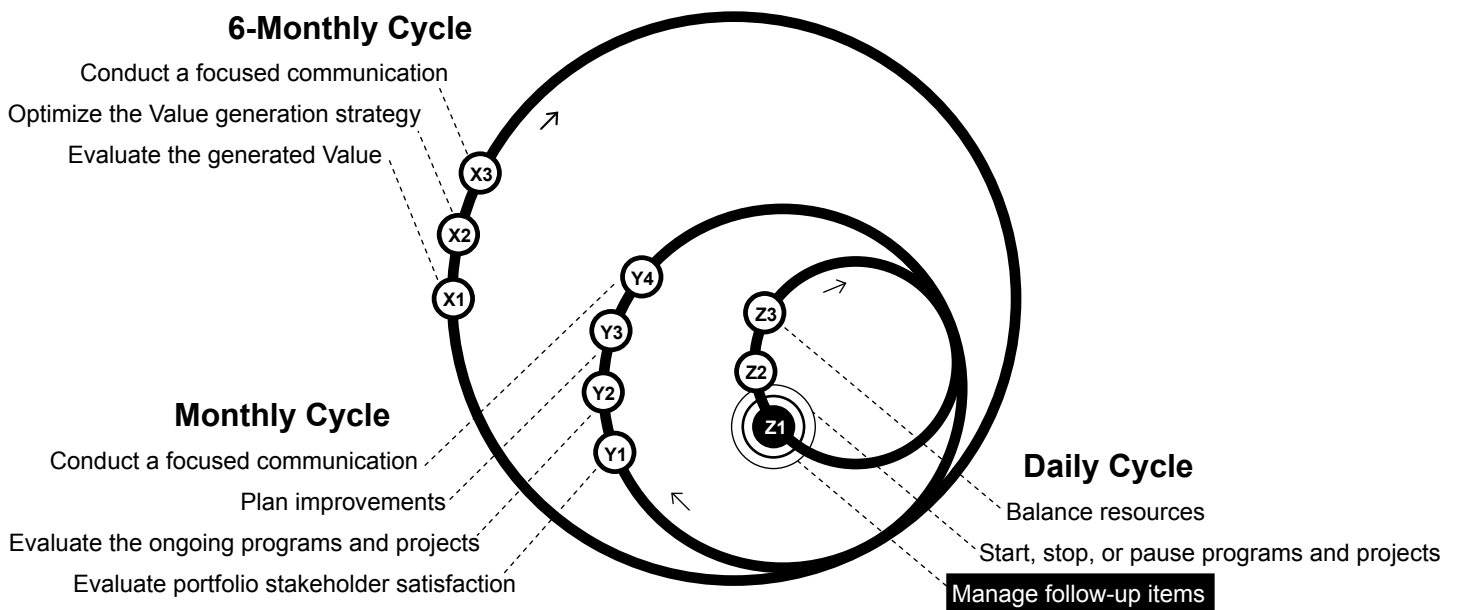
Purpose .....

Message .....

Audience .....

Part 6

# ***Daily Cycle***



1

2

3

4



Portfolio Description



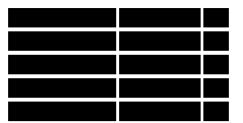
Value Generation Matrix



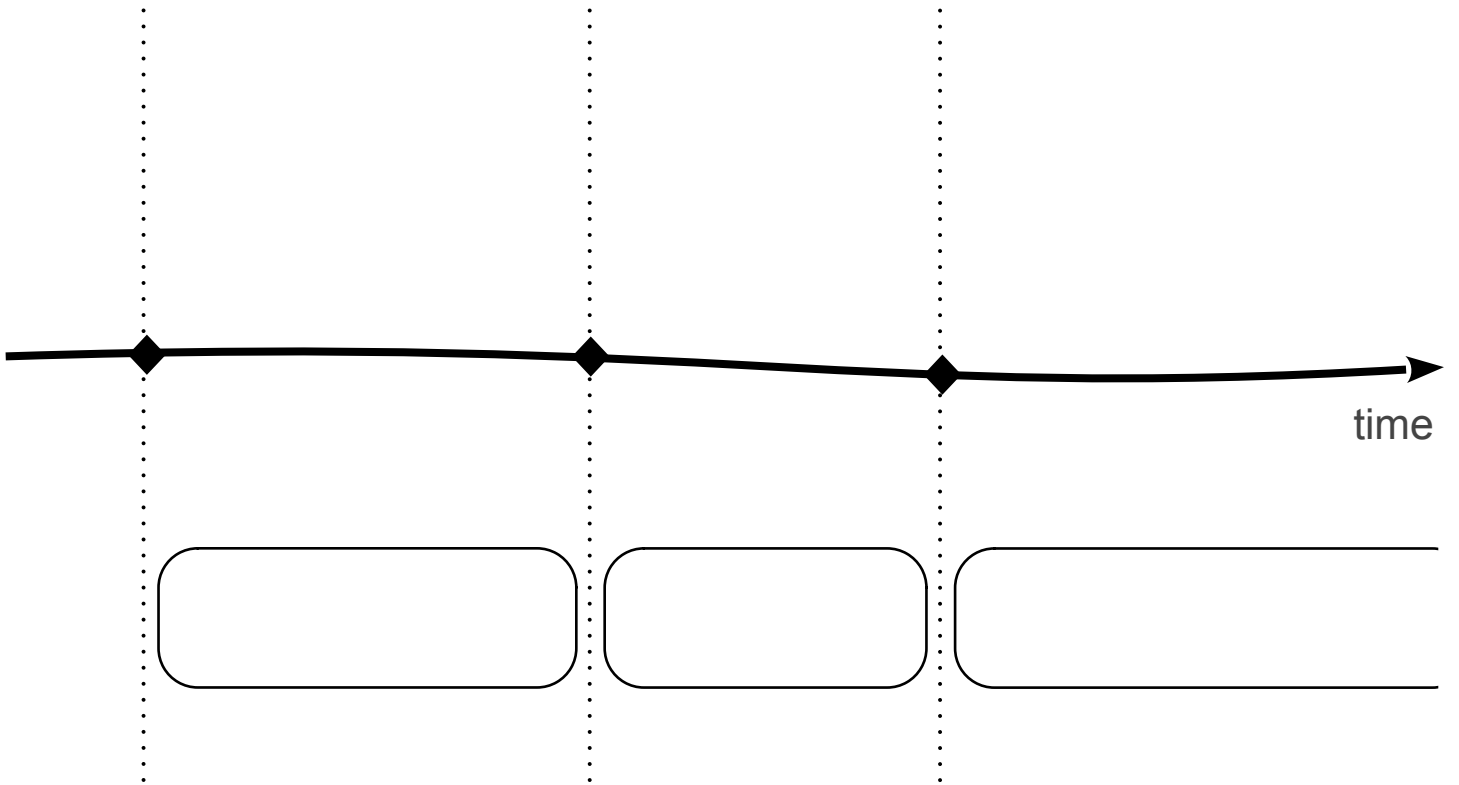
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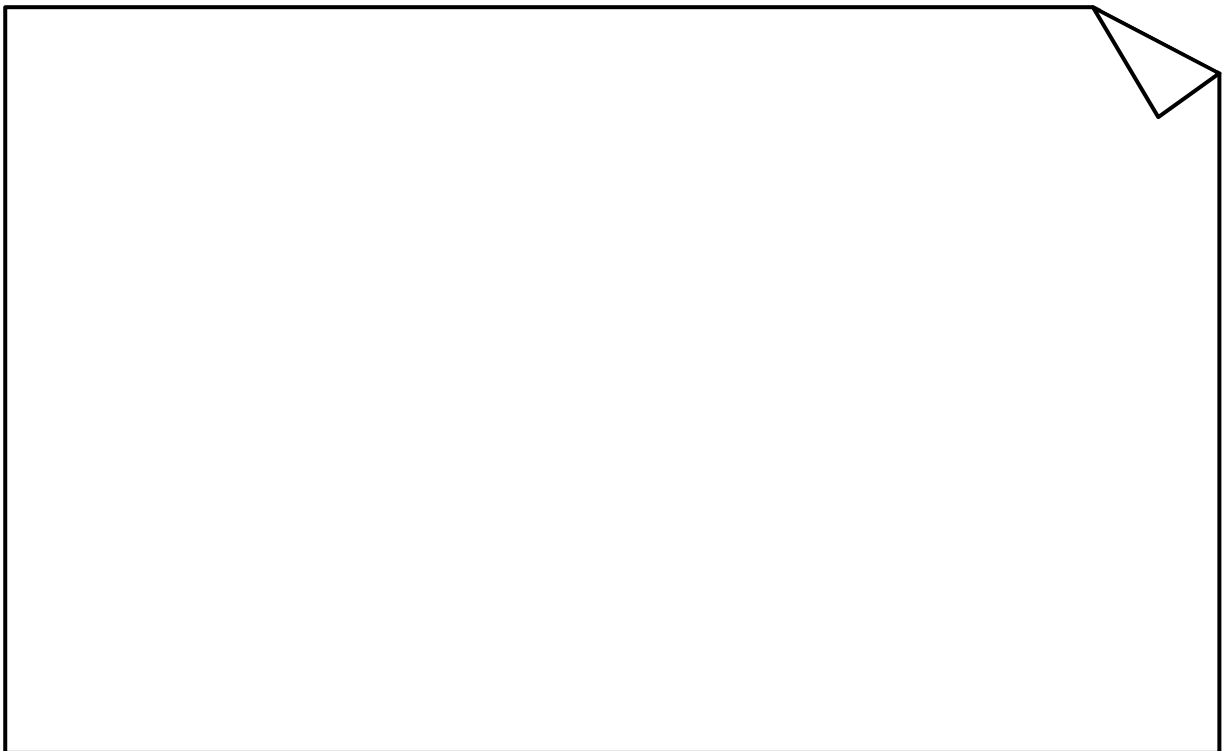
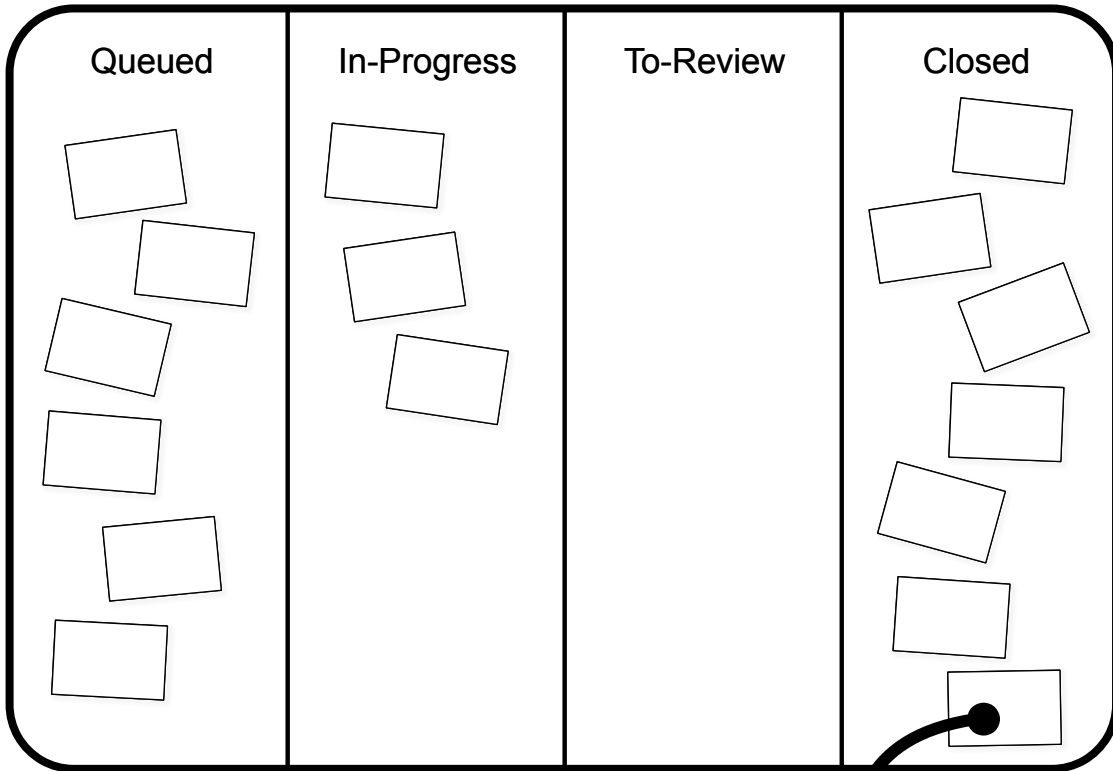


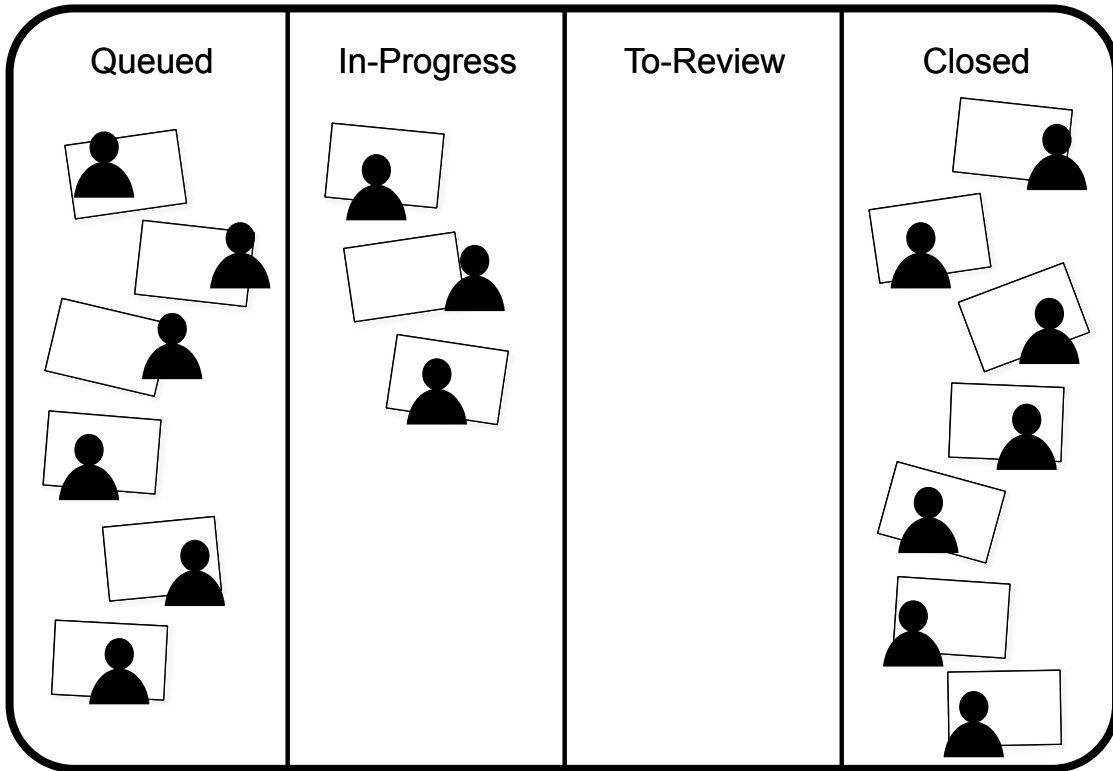
Follow-Up Register

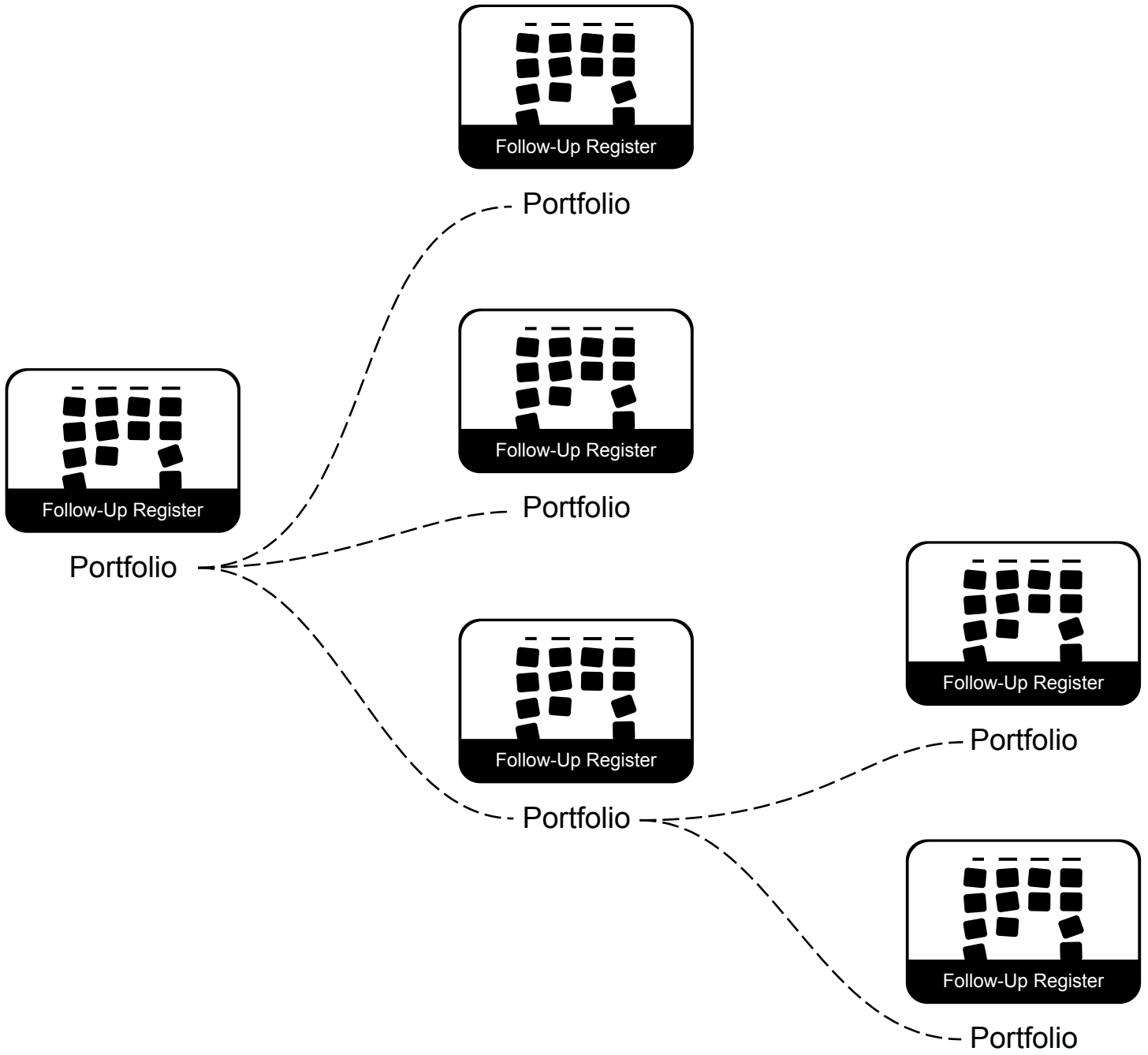


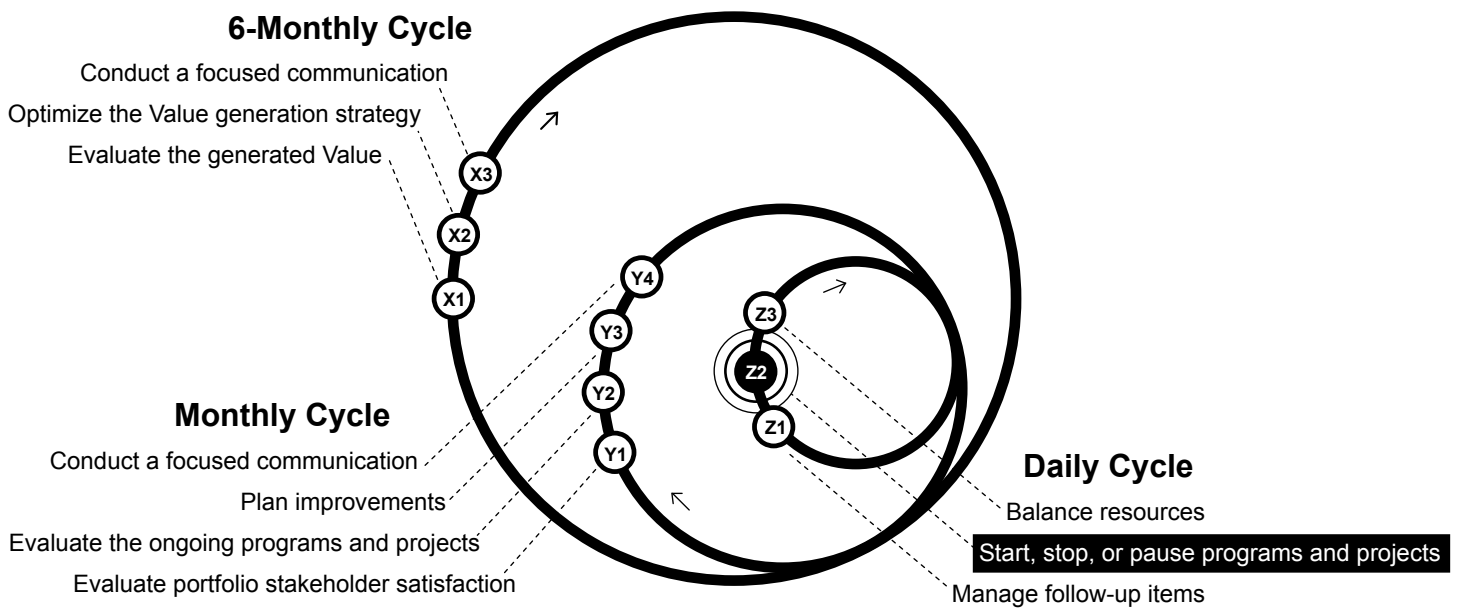
Health Register

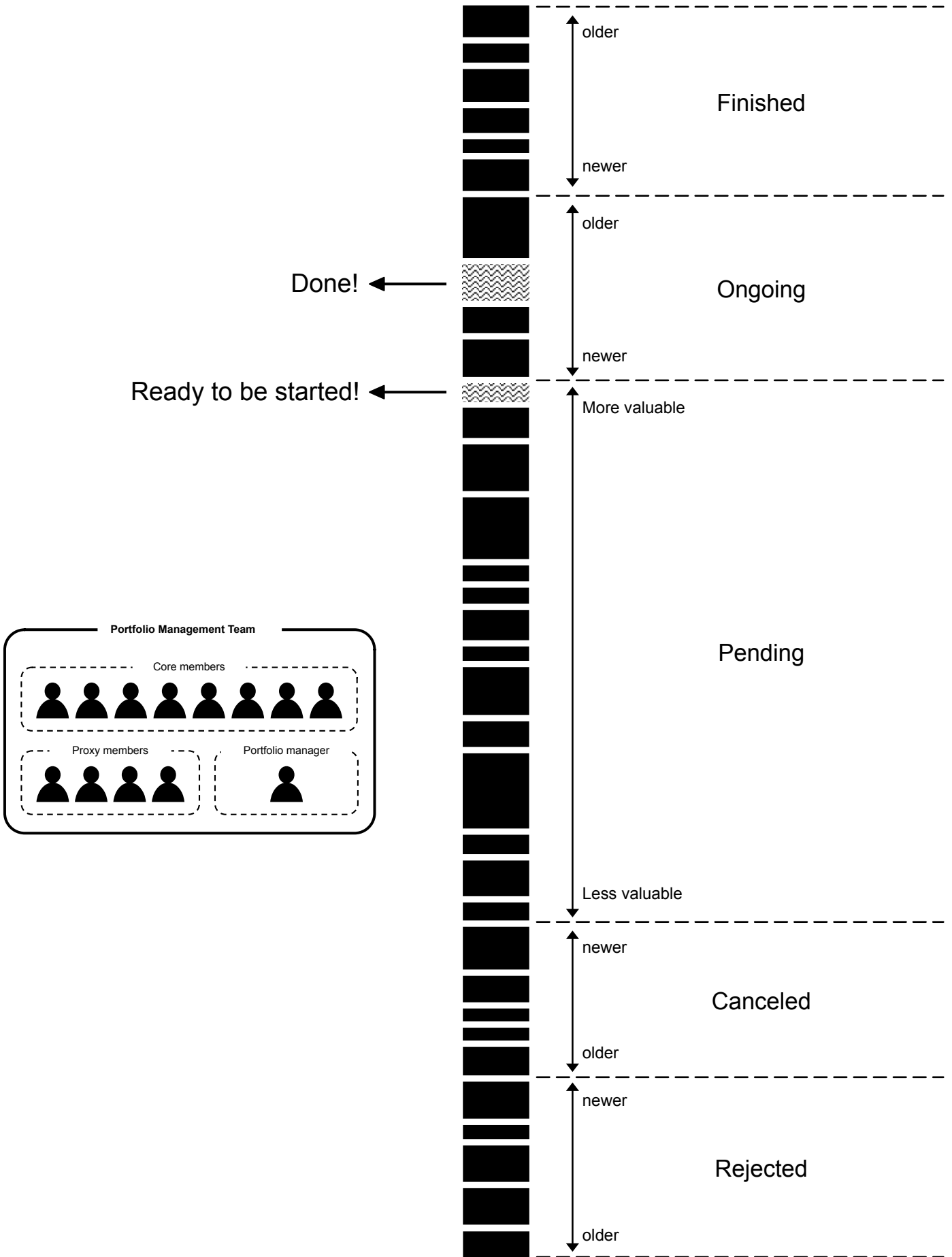


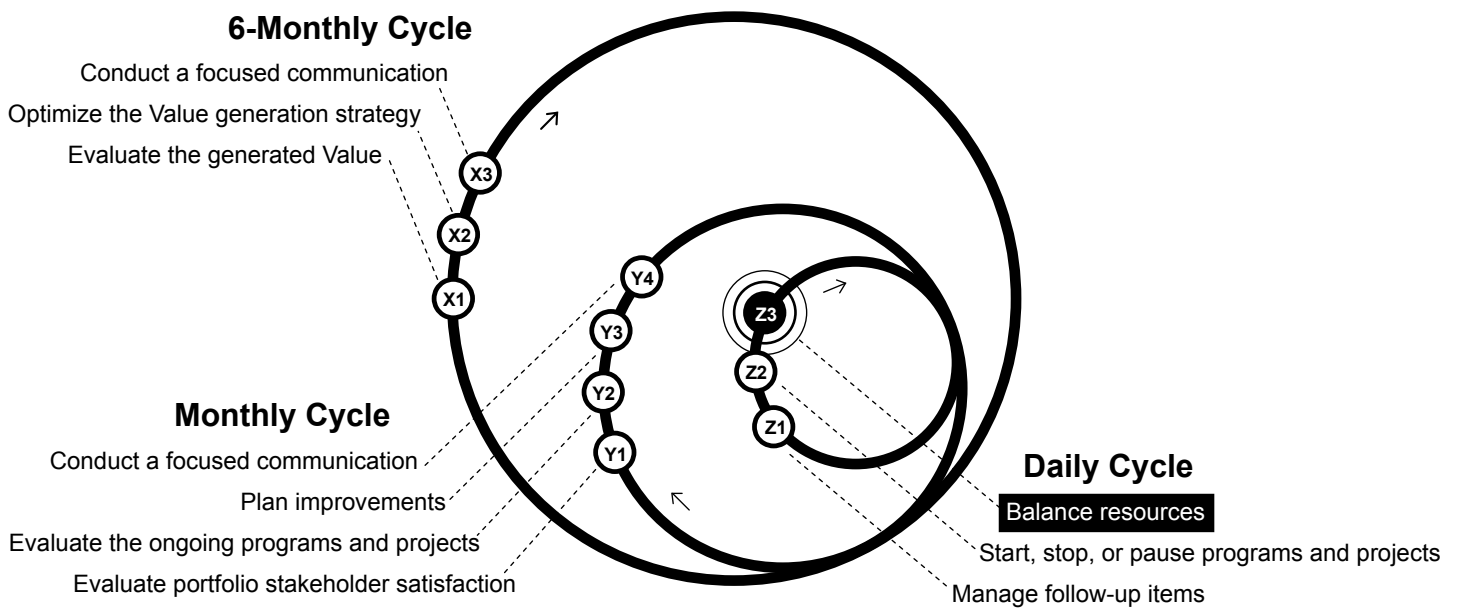


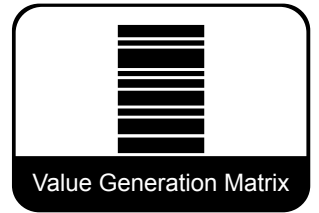
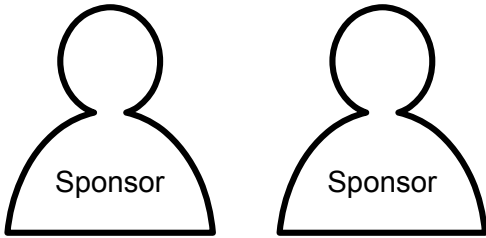








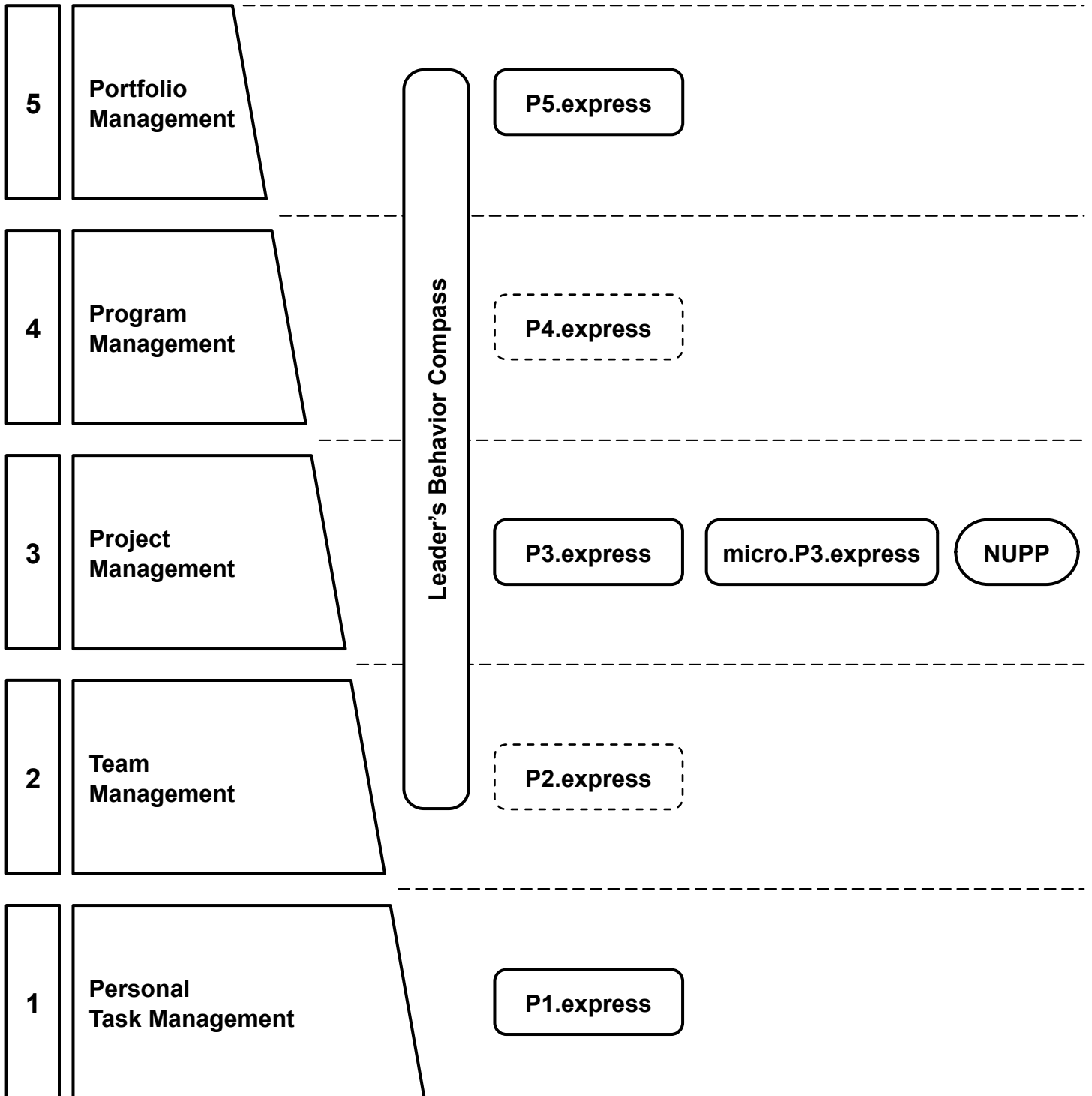




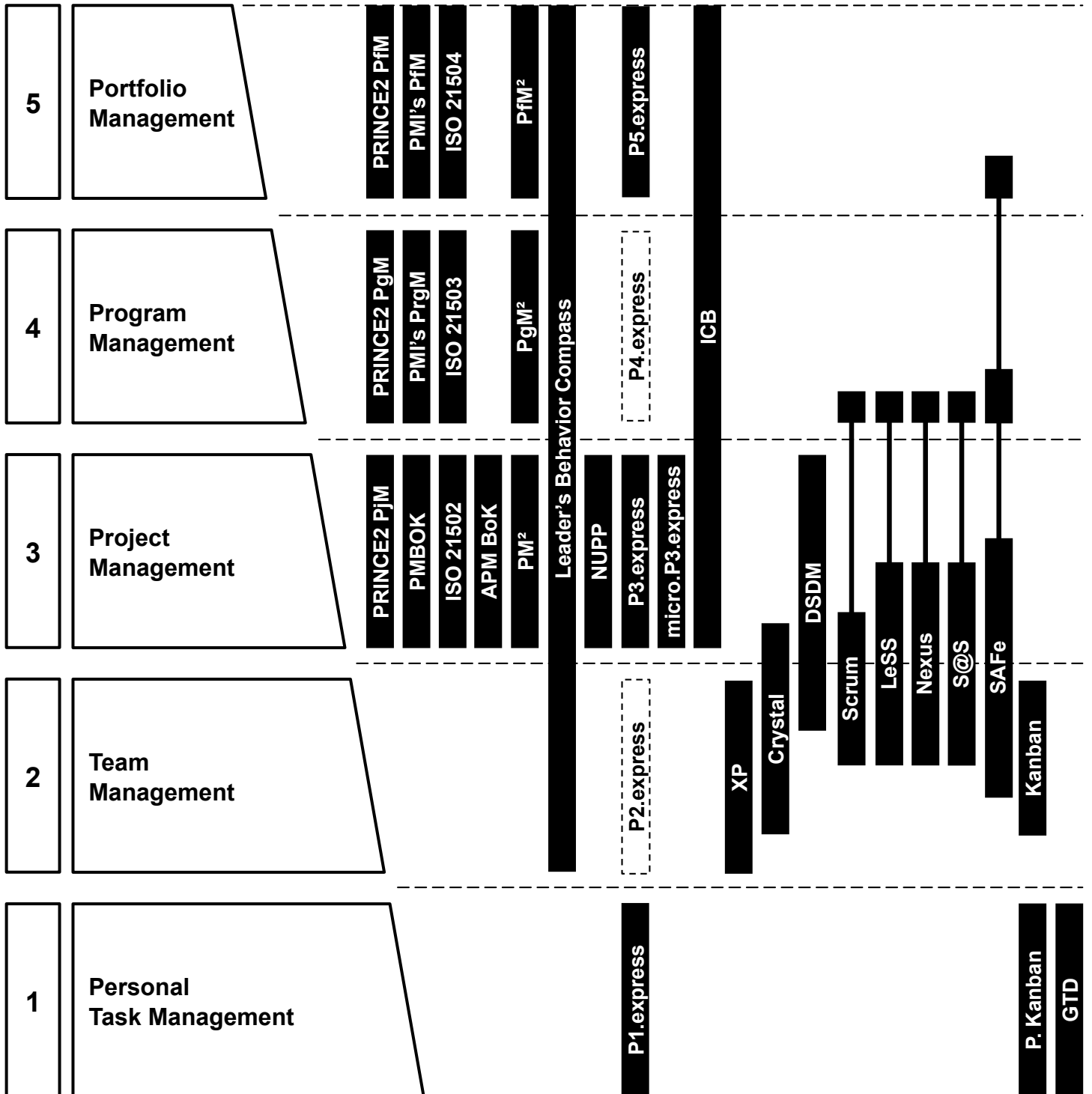
Part 7

# ***Range of Use***

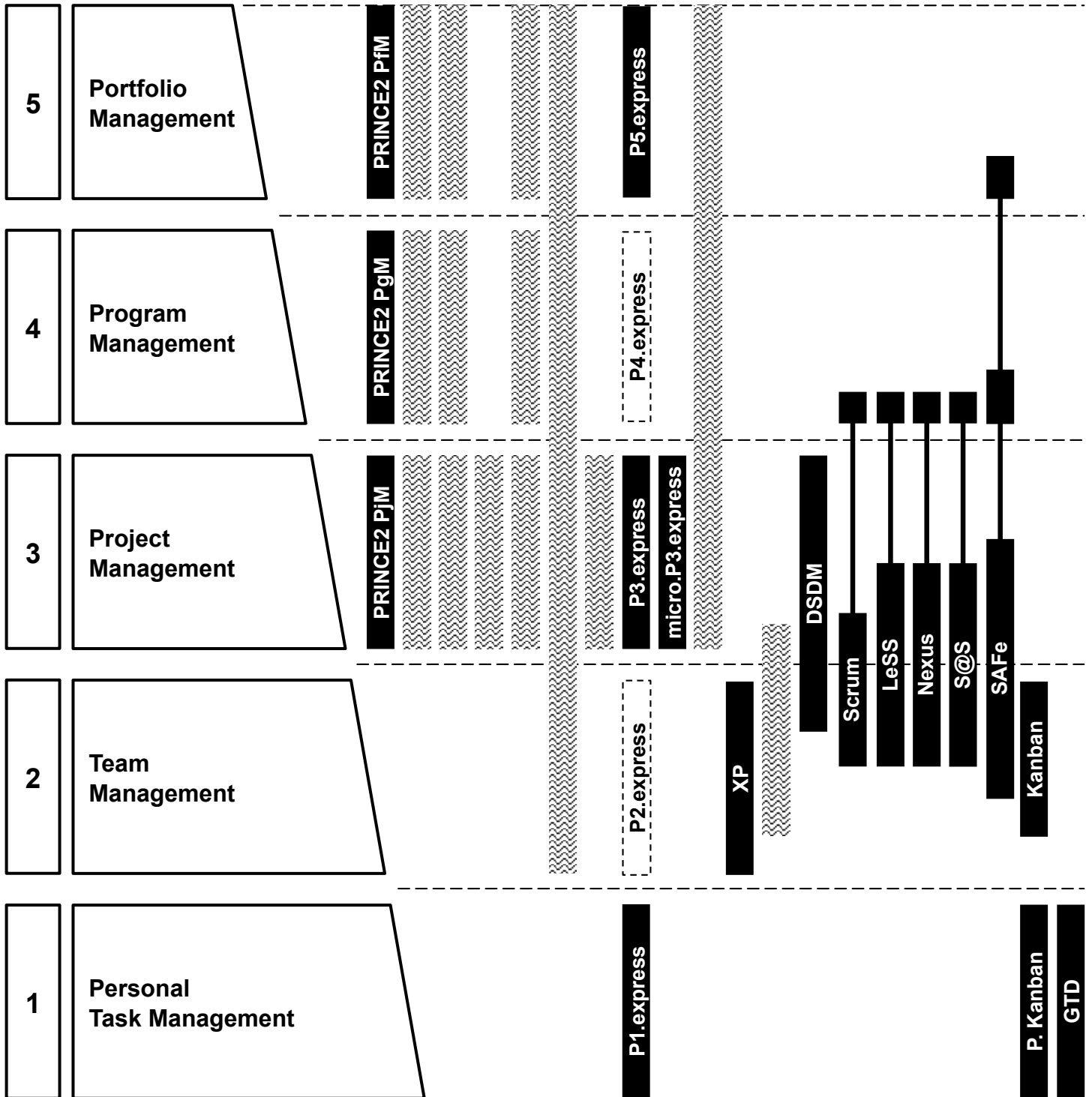
# Range of Use



# Range of Use



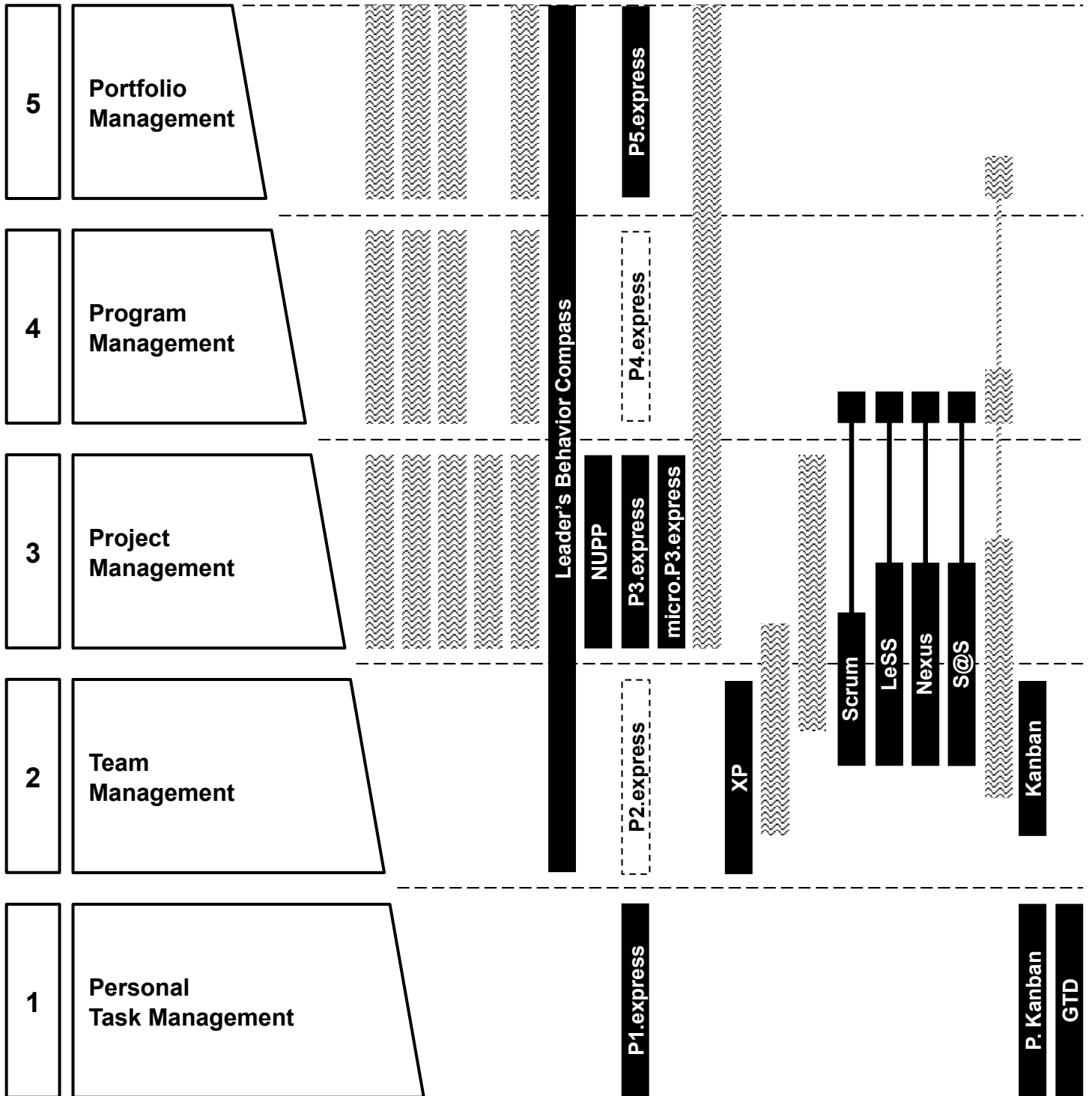
# Range of Use



■ Roadmap (method/methodology/framework)

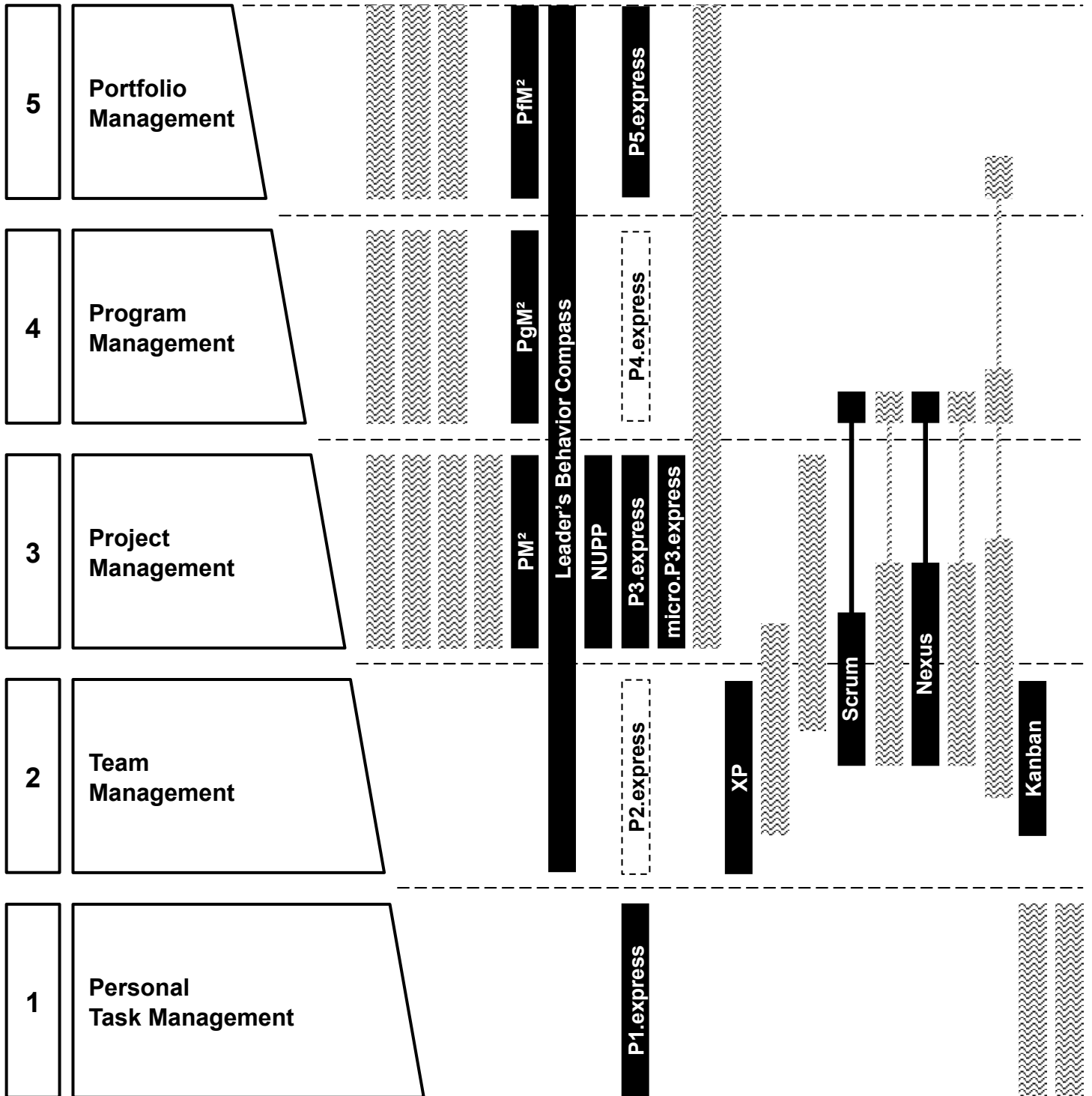
▨ Advice (guide)

# Range of Use



- Minimalist
- ▨ Maximalist

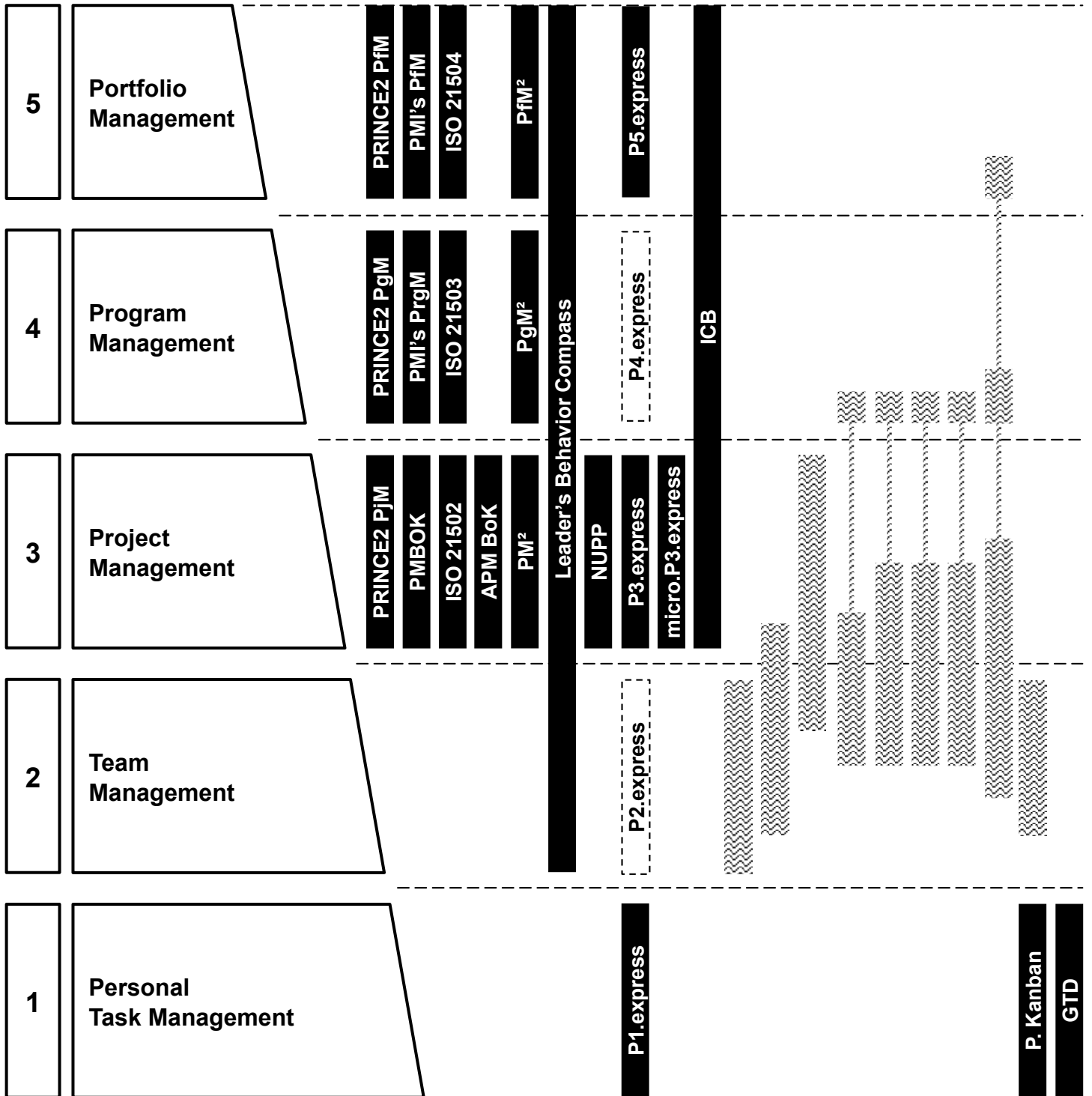
# Range of Use



■ Libre

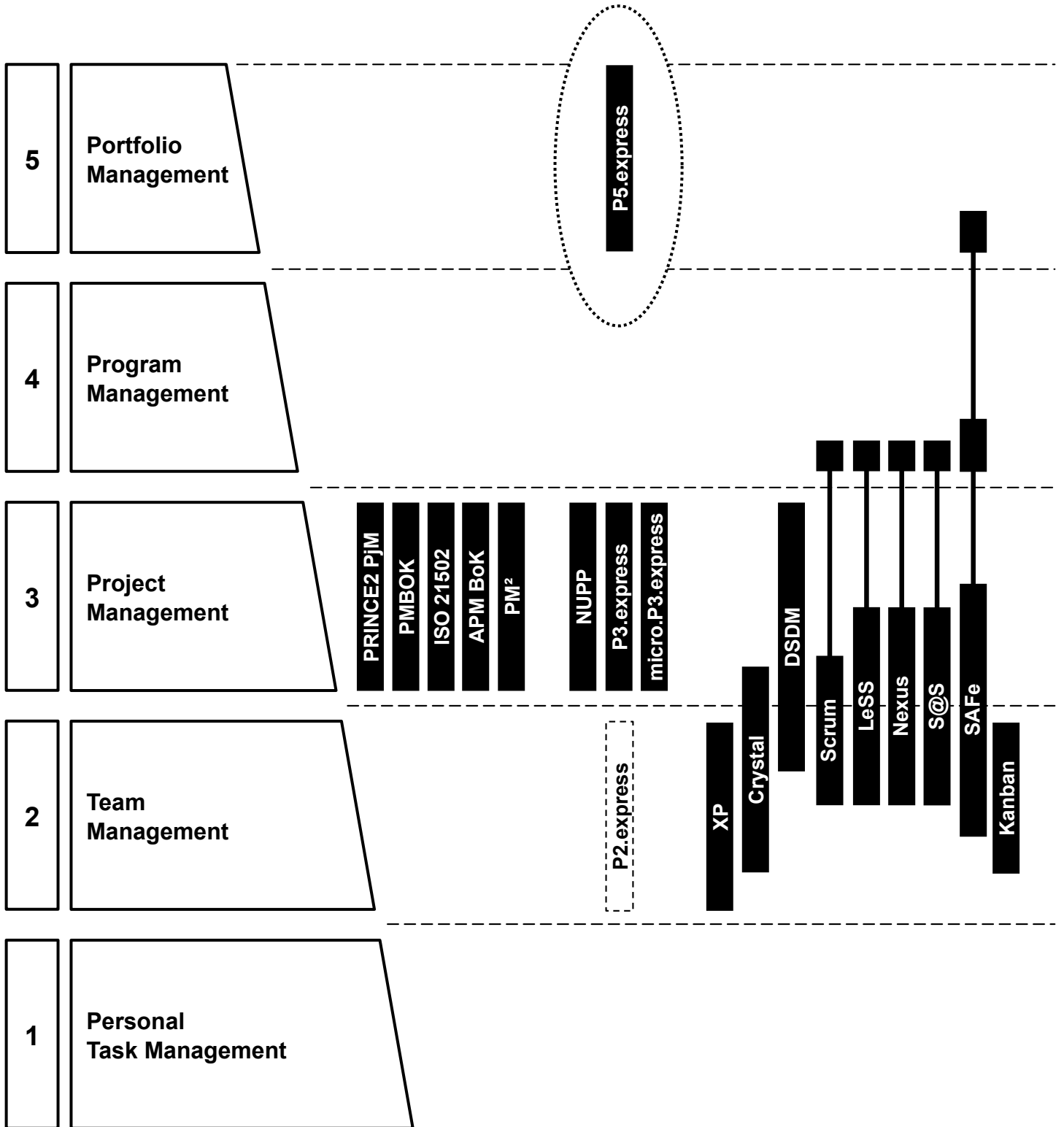
▨ Proprietary

# Range of Use

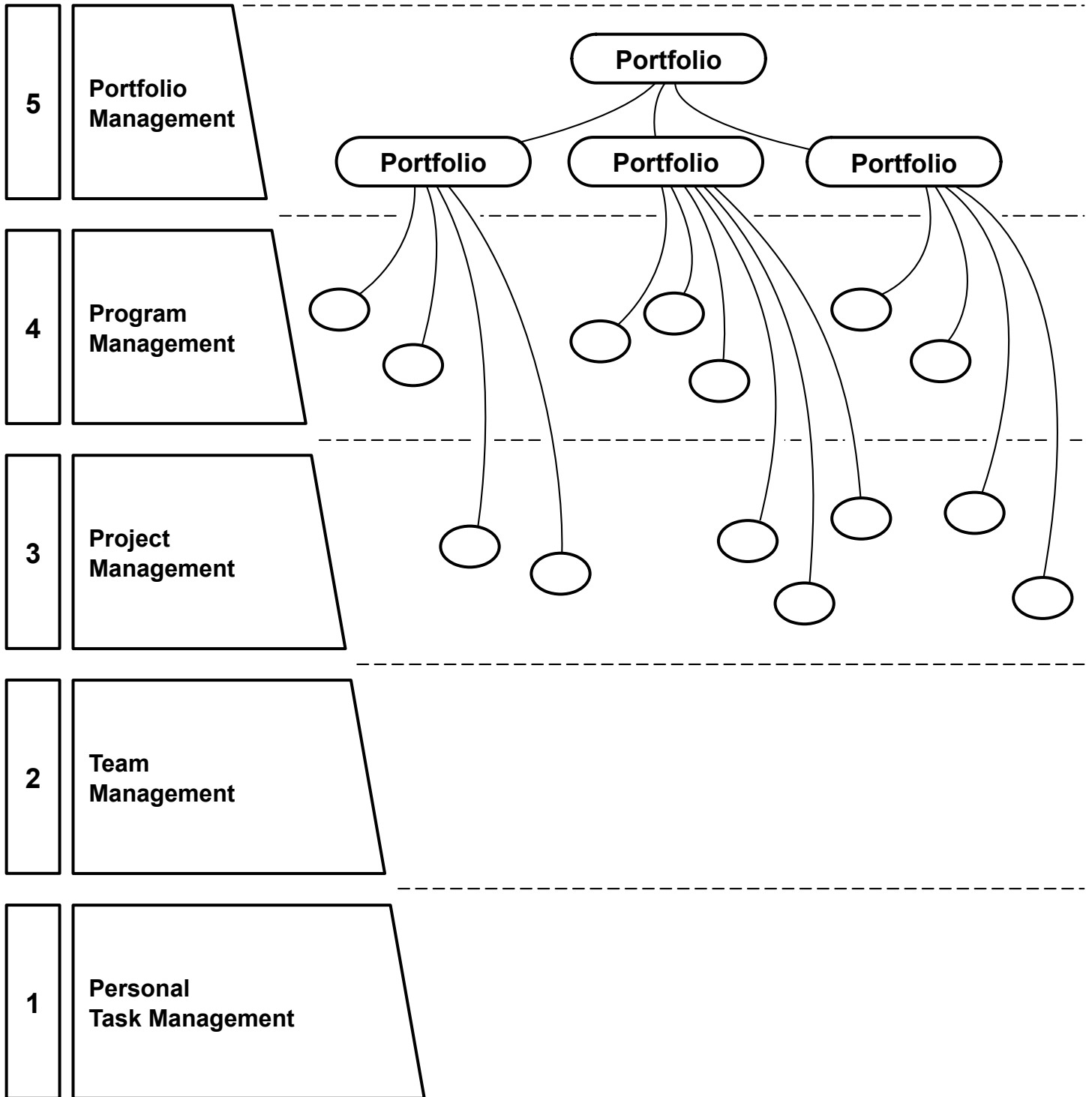


- General
- ▨ Domain-specific

# Range of Use



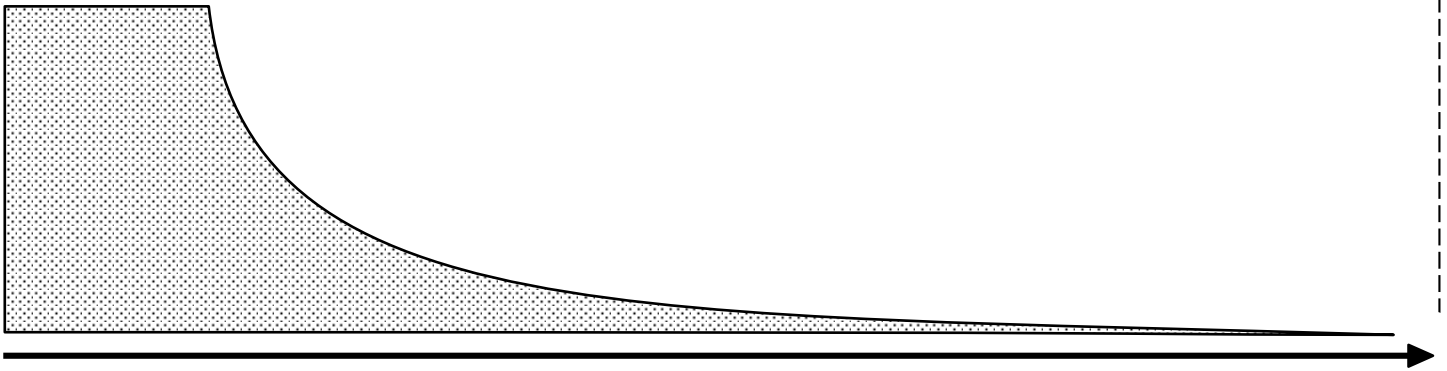
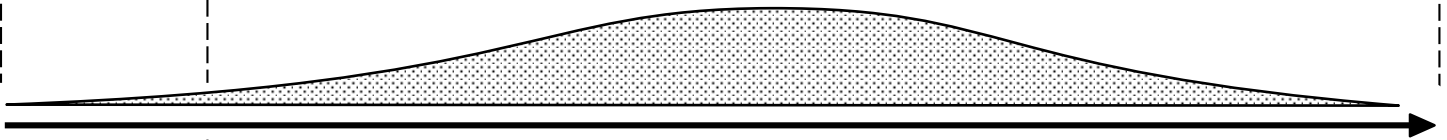
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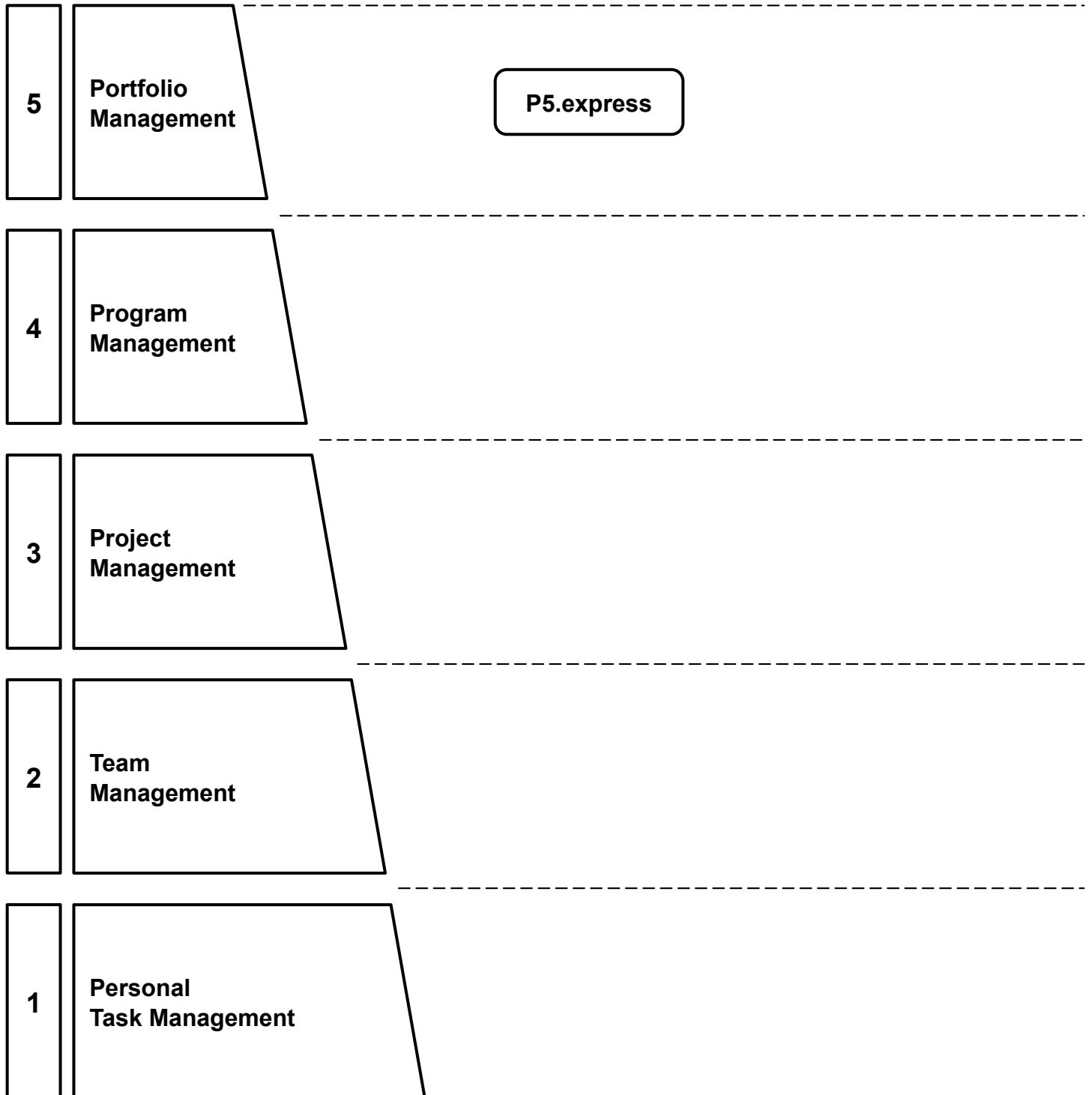
# Range of Use

Upfront tailoring

Continuous tailoring



# Range of Use



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