

2026 Investor Checklist

Three Financial Steps for the New Year

Step 1 Portfolio Audit and Health Check



- Evaluate portfolio performance, review what worked, what didn't, and why
- Check your asset allocation and rebalance if needed
- Review how much you've paid in fees (e.g. management fees, brokerage fees)

Step 2 Positioning for 2026



- Check if portfolio is built to handle different market conditions
- Consider exposure to long-term structural growth themes
- Read the **Global X 2026 Market Outlook** to help identify opportunities and risks

Step 3 Reset Your Habits: Invest Better in the New Year



- Reflect and record mistakes and lessons from 2025
- Create rules and guardrails to guide behaviour and limit emotional decision-making
- Build disciplined investing habits through dollar-cost averaging, **dividend reinvestment plans (DRPs)**, and asset class diversification