Portfolio decision brief.

Northstar Nutrition / Demonstration company / October 2026

Clarity.

Before commitment.

Clarify the role of two sleep products before expanding the range. Validate the commercial case with customer and cost data.

What this example demonstrates

An executive summary, source-linked product questions, an explicit financial scenario and a practical review plan. Every company, product, source and amount in this document is synthetic.

FORMULA EVIDENCE FIT

The executive view.

Three priorities for the next portfolio discussion.

01 Review the sleep range.

Evening Magnesium and Night Blend share an ingredient and an evening-use position. This indicates a question to investigate, not proof of cannibalization. [S01, S02]

Product + commercial lead: compare audiences, repeat purchases and channel sales before combining or removing a product.

02 Check the launch brief.

Calm Concept includes a relaxation claim without a supplied product-context evidence assessment. The wording remains unverified. [S03]

Regulatory + product lead: assess the form, dose, population and wording with a qualified reviewer.

03 Model contribution, not revenue.

A portfolio change depends on demand transfer, unit contribution and avoidable costs. The commercial example is an assumption-based scenario. [S04]

Finance lead: replace sample assumptions with approved figures and test downside cases.

The product behind the priority.

Illustrative product review / Not a clinical assessment

Evening Magnesium

S01 / Single-ingredient evening routine

Shares magnesium and a usage occasion with Night Blend. Complete formulas may differ.

Next validation: Verify audience and repeat-purchase differences.

Night Blend

S02 / Multi-ingredient evening formula

Its positioning needs a clearer distinction from Evening Magnesium in this illustrative brief.

Next validation: Review the complete formula, dose basis and customer motivations.

Calm Concept

S03 / Proposed extension, not launched

Demand and product-context claim substantiation are not established.

Next validation: Resolve evidence and commercial gaps before production commitment.

Actual reports retain supplied source provenance and available assessments. Unknown values stay unknown. No ingredient-level efficacy conclusion is made in this demonstration.

Make assumptions visible.

S04 / Illustrative annual contribution scenario / USD

Avoidable annual fixed costs	$12,000
Annual units of removed product	2,000
Contribution per unit, both products	$8
Assumed demand transfer	50%

ILLUSTRATIVE NET ANNUAL CHANGE

+$4,000

$12,000 - 2,000 x (1 - 50%) x $8 = $4,000

At 0% transfer: -$4,000. At 25% transfer: break-even. At 100% transfer: +$12,000. These are calculated scenarios, not measured savings.

Assumes equal unit contribution, sufficient capacity and truly avoidable fixed costs. Excludes transition costs, taxes, working capital, lifetime customer effects and channel changes. Finance must validate every assumption before a decision.

From review to action.

Illustrative sequence / Timing and owners to be agreed with the client

Collect the missing inputs.

Product lead: current labels, full formulas and intended audiences. Finance: channel-level sales, unit costs and avoidable fixed costs.

Test the portfolio hypothesis.

Commercial lead: customer segments, demand transfer and repeat-purchase patterns. Similar formulas alone do not establish lost sales.

Review the evidence.

Qualified reviewer: assess the proposed claim against the relevant form, dose, population and product context.

Agree the decision.

Leadership: weigh the scenarios, unresolved risks and validation results. Record the rationale and accountable owner.

Delivery note: final production reports require analyst review. Payment alone does not verify evidence or convert an AI draft into an approved recommendation.

Sources & boundaries.

Demonstration references / No external evidence is claimed

S01

Example product label: Evening Magnesium. Synthetic label created for this demonstration.

S02

Example product label: Night Blend. Synthetic label created for this demonstration.

S03

Example launch brief: Calm Concept. Synthetic brief; no clinical study supplied.

S04

Illustrative financial assumptions. Editable example, not observed commercial data.

What remains unknown

Actual demand transfer, full product formulas, channel economics, representative customer evidence and product-context scientific assessment.

In a client report, this section identifies the actual supplied files, retrieved pages, available research records and disclosed limitations. This example illustrates presentation only.