

# FINANCIAL REPORT

Period: April 2025

April 01, 2025 to April 30, 2025

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Report Date: 04/19/2025

## FINANCIAL SUMMARY

Total Income	\$100000.00
Total Expenses	\$11000.00
Total Investments	\$10000.00
Net Balance	\$79000.00

For this period, you had a positive balance of \$79000.00. This means your income exceeded your expenses and investments.

## CURRENT ACCOUNT BALANCES

Savings Balance	\$10000.00
Expenses Balance	\$40000.00
Investments Balance	\$10000.00
Total Assets	\$60000.00

## INCOME BREAKDOWN

Source	Amount	% of Total
Other	\$100000.00	100.0%

### Income Details:

04/19/2025 - Other: \$100000.00 - Regular income

EXPENSE BREAKDOWN

Category	Amount	% of Total
Rent	\$11000.00	100.0%

INVESTMENT SUMMARY

Type	Amount	% of Total
Other	\$10000.00	100.0%

SAVING GOALS

Goal	Target	Current	Progress
Emergency Fund	\$20000.00	\$19000.00	95.0%

# DETAILED TRANSACTION LIST

The following is a detailed list of all transactions for the period April 01, 2025 to April 30, 2025.

Date	Type	From	To	Amount	Description
04/19/2025	Expense	expenses	External	\$11000.00	Expense: Rent
04/19/2025	Transfer	savings	expenses	\$1000.00	Transfer from savings to expenses
04/19/2025	Expense	savings	External	\$19000.00	Contribution to savings goal: Emergency Fund
04/19/2025	Expense	investments	External	\$10000.00	Investment in undefined
04/19/2025	Transfer	income	investments	\$20000.00	Distribution from income to investments
04/19/2025	Transfer	income	expenses	\$50000.00	Distribution from income to expenses
04/19/2025	Transfer	income	savings	\$30000.00	Distribution from income to savings
04/19/2025	Income	External	income	\$100000.00	Regular income

## FINANCIAL INSIGHTS & RECOMMENDATIONS

### Income & Expense Analysis:

- You saved 79.0% of your income during this period.
- This is a healthy savings rate. Keep up the good work!
- Your highest expense category was "Rent" at \$11000.00 (100.0% of total expenses).
- This category represents over half of your expenses. Consider if this allocation aligns with your financial priorities.

### Savings & Investment Strategy:

- You currently have \$10000.00 in your savings.
- You invested \$10000.00 (10.0% of income) during this period.
- You're making progress on 1 saving goals (95.0% overall completion).

### Recommended Actions:

- Build your emergency fund to cover at least 3-6 months of expenses.
- Regularly review your budget and adjust as needed.
- Consider automating your savings to maintain consistency.

This report was generated on April 19, 2025 at 2:45 PM.  
This report is for informational purposes only and does not constitute financial advice.