

# 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.