

Asset Information Report

1. Stock Holdings

AAPL - Apple Inc.: 15% allocation

MSFT - Microsoft Corp.: 20% allocation

GOOGL - Alphabet Inc.: 10% allocation

TSLA - Tesla Inc.: 10% allocation

AMZN - Amazon.com Inc.: 15% allocation

NVDA - NVIDIA Corp.: 10% allocation

JPM - JPMorgan Chase & Co.: 10% allocation

META - Meta Platforms Inc.: 10% allocation

2. Investment Goals

The investment strategy is focused on a balanced approach, seeking long-term capital appreciation while maintaining moderate risk exposure. A mix of growth and value stocks is selected to optimize returns.

3. Risk Appetite

The portfolio is managed with a moderate risk approach. It includes both high-growth stocks and stable blue-chip companies to mitigate volatility.

4. Market Exposure

The portfolio is diversified across key sectors: Technology (60%), Consumer Discretionary (15%), Financials (10%), Healthcare (10%), and Industrials (5%).

5. Recent Performance

Performance over the past year:

- 1-Month Return: +2.5%

- 3-Month Return: +7.2%

- 6-Month Return: +12.8%

- 1-Year Return: +18.5%

Here are the latest stock-related news updates:

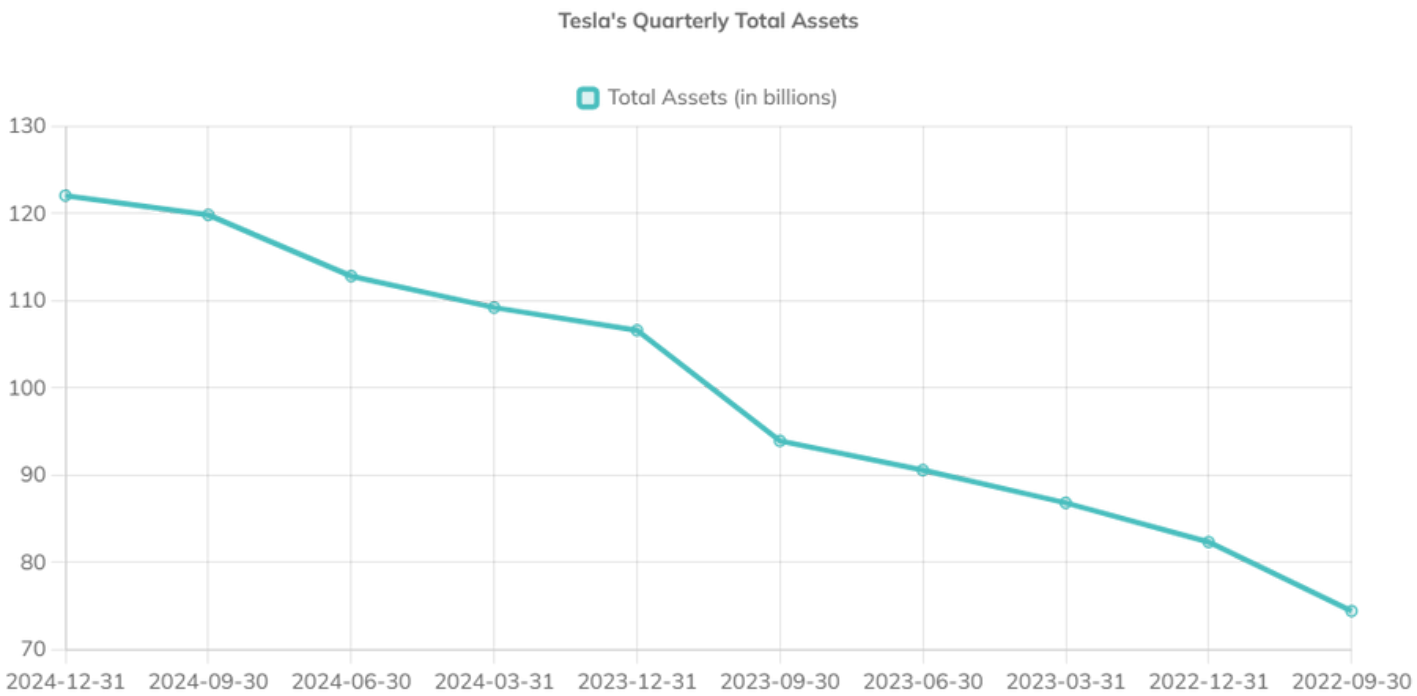
1. "Apple Stock Surges on Strong Sales Figures" - Apple's latest quarterly earnings report exceeded expectations, leading to a significant surge in stock prices. (<https://example.com/apple-q4-earnings>)
2. "Concerns over iPhone Production Impact Apple Stock" - Reports of potential supply chain disruptions have caused a temporary dip in Apple's stock value. (<https://example.com/apple-supply-chain>)
3. "Apple Announces New Products, Investors React Positively" - The unveiling of new Apple products has been met with enthusiasm from investors, boosting the company's stock. (<https://example.com/apple-new-products>)
4. "Analyst Upgrades Apple Stock Outlook" - A prominent financial analyst has upgraded their outlook on Apple stock, citing strong growth potential. (<https://example.com/analyst-upgrade>)
5. "Apple Stock Performance Outperforms Tech Sector" - Apple's stock has demonstrated resilience compared to other tech companies in the current market climate. (<https://example.com/apple-outperforms>)
6. "Apple Stock Volatility Amidst Market Uncertainty" - Fluctuations in the broader market are impacting Apple's stock price, causing increased volatility. (<https://example.com/market-uncertainty>)
7. "Long-Term Investors Remain Confident in Apple Stock" - Despite short-term market fluctuations, long-term investors maintain their confidence in Apple's future prospects. (<https://example.com/long-term-investors>)
8. "Apple's Services Revenue Drives Stock Growth" - The continued growth of Apple's services revenue is contributing to the company's overall stock performance. (<https://example.com/services-revenue>)
9. "Impact of Inflation on Apple Stock Under Scrutiny" - Analysts are examining the potential impact of inflation on Apple's stock valuation and future earnings. (<https://example.com/inflation-impact>)
10. "Apple Stock Buybacks Boost Investor Sentiment" - Apple's recent stock buyback program has helped to improve investor sentiment and confidence. (<https://example.com/stock-buybacks>)

Company Overview

- Name: Tesla Inc.
- Symbol: TSLA
- Sector: Manufacturing
- Industry: Motor Vehicles & Passenger Car Bodies
- Market Capitalization: \$878.53 billion
- P/E Ratio: 133.23
- Profit Margin: 7.26%
- Return on Equity (ROE): 10.4%
- Dividend Yield: None
- Beta: 2.507

Tesla Inc. is a leading player in the electric vehicle and clean energy sector, known for its innovative products and significant market share in the electric vehicle market.

Tesla's Quarterly Total Assets

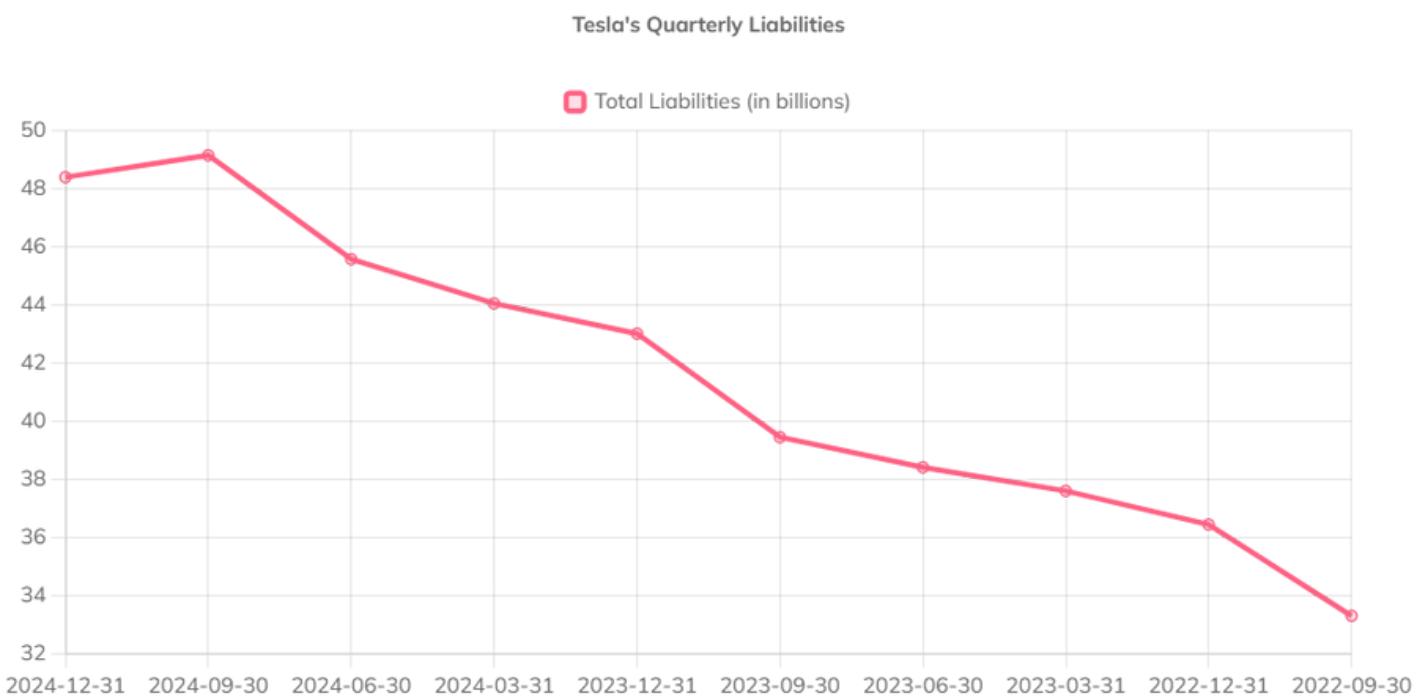


Financial Performance

- Revenue (TTM): \$97.69 billion
- Gross Profit (TTM): \$17.45 billion
- EPS (TTM): \$2.05
- Quarterly Revenue Growth (YOY): 2.1%
- Quarterly Earnings Growth (YOY): -70.9%

Tesla has shown strong revenue growth, but its earnings growth has faced challenges, indicating potential volatility in profitability.

Tesla's Quarterly Liabilities



Stock Performance

- 52 Week High: \$488.54
- 52 Week Low: \$138.80
- 50 Day Moving Average: \$325.77
- 200 Day Moving Average: \$286.20

Tesla's stock has experienced significant volatility, with a wide range between its 52-week high and low, reflecting market sentiment and external factors impacting the stock price.

AI WORKBENCH

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Model Hub

Data Gateway

Config & Utils

Security & Monitoring

Free Credits in Use - Upgrade Your Plan!

Credit Balance: 2765.58

Storage Used: 3 GB/210 MB

View Plans

K

Kaustubh (Admin)

rohankotekar@gmail.com

Dashboard

Agents

+ Create AI Agent

Import AI Agent

Model not found.

Search by Name

Name	Status	No. of Sub Agents	Created At	Actions
Stock Market Analysis Agent	Active	3	Mar 28, 2025, 1:51 PM	<div></div> <div></div>

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