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Dashboard

PORTFOLIO
HEALTH SCORE

85 / 100

Excellent

Your portfolio shows strong resilience and growth potential.

OVERALL GAIN

+\$2,530

↗ +15.2% YTD

RISK LEVEL

Moderate

Stable

Allocation Breakdown



● Technology ● Financials

● Healthcare ● Consumer Discretionary

● Other

Overall Performance

1D 1W 1M 3M 6M YTD 1Y ALL



Top Holdings

[View All](#)



Apple Inc.
AAPL

\$178.50
↗ +1.25%



Microsoft Corp.
MSFT

\$420.10
↗ +0.89%



Alphabet Inc. (Class A)
GOOGL

\$153.20
↘ -0.32%



Amazon.com Inc.
AMZN

\$186.75
↗ +1.50%



Tesla Inc.
TSLA

\$170.90
↘ -0.70%

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AAPL Apple Inc.

\$172.50 \$-3.10 (-1.83%)

Mkt Cap: \$2.65T

Price Action

AAPL - Daily Chart (May 2024)



AI Earnings Call Insights

Key takeaways from recent earnings calls

Apple's latest earnings call highlighted strong performance in its Services segment, offsetting a slight dip in iPhone sales. Management expressed confidence in long-term growth driven by emerging markets and a robust product pipeline. Supply chain constraints are easing, which could positively impact production and sales in the upcoming quarters. The company's focus on user retention and ecosystem expansion remains a key strategic pillar, with subscription growth exceeding expectations.

Fundamentals Overview

Key valuation and operational metrics

P/E Ratio (TTM)

28.5x

Market Cap

\$2.65T

EPS (TTM)

\$6.20

Dividend Yield

0.55%

Beta

1.25

52-Week Range

\$150.00 - \$200.00

Revenue & Earnings Trends

Quarterly performance over time



Analyst Estimates

Future price targets from analysts



Recent News

Latest headlines affecting Apple Inc.

Apple to Report Q2 Earnings on May 2nd, Analysts Expect Flat Revenue

Bloomberg • 2 days ago

New iPhone SE Launch Imminent, Supply Chain Hints at Early Summer Release

Reuters • 5 days ago

Regulatory Scrutiny on App Store Fees Intensifies Globally

Wall Street Journal • 1 week ago

Apple's Services Revenue Continues Strong Growth Trajectory

TechCrunch • 2 weeks ago

Dashboard

Portfolio Overview

AI Insights

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AI Insights

Get an actionable overview of hidden risks, concentration issues, upcoming events, and suggested actions for your portfolio.

Severity:

All

Critical

Warning

Type:

All

Risks

Concentration

Earnings Events

Informational

Suggested Actions

Search insights...

Critical

New

High Insider Selling Detected in ACME Corp.

Recent filings indicate significant insider selling activity over the past 3 months,

[View ACME Corp. Details >](#)

Warning

Portfolio 35% Exposed to Technology Sector

Your portfolio currently has a high concentration in the Technology sector. While it has

[View Portfolio Overview >](#)

Informational

NVIDIA (NVDA) Earnings Call Next Week

NVIDIA is scheduled to report earnings next Wednesday. AI sentiment from recent news

[View NVIDIA Details >](#)

Critical

Review ACME Corp. Debt-to-Equity Ratio

The debt-to-equity ratio for ACME Corp. has increased significantly over the last two

[View ACME Corp. Details >](#)

Warning

Regulatory Scrutiny for BioGen Pharma

BioGen Pharma is facing increased regulatory scrutiny regarding a key drug candidate,

[View BioGen Pharma Details >](#)

Informational

Geographic Exposure to Emerging Markets

Your portfolio has a notable exposure to emerging markets. While offering growth potential,

[View Portfolio Overview >](#)

Warning

Tesla (TSLA) Earnings: Mixed Analyst Sentiment

Tesla is reporting earnings soon. Analyst sentiment is mixed, with some concerns

[View Tesla Details >](#)

Informational

Consider Rebalancing Energy Sector Holdings

The energy sector has seen significant gains recently. It may be opportune to rebalance

[View Portfolio Overview >](#)

Critical

Supply Chain Disruptions for Global Tech Inc.

Global Tech Inc. is experiencing severe supply chain disruptions impacting production and

[View Global Tech Inc. Details >](#)

Critical

Single Stock Exposure Exceeds Threshold in S&P 500 ETF

A single stock within your S&P 500 ETF now accounts for an unusually high percentage,

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Informational

Meta Platforms (META) Earnings Preview

Meta Platforms is preparing to report. Focus will be on advertising revenue growth and

[View Meta Platforms Details >](#)

Warning

Review Recent Geopolitical Impact on Oil & Gas Holdings

Recent geopolitical events could significantly impact your oil and gas holdings. It is

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Portfolio Overview

1 Month

Base Case

Export Data

Generate Report

Total Portfolio Value

\$1,250,000

+0.5% today

Today's Gain/Loss

+\$6,250

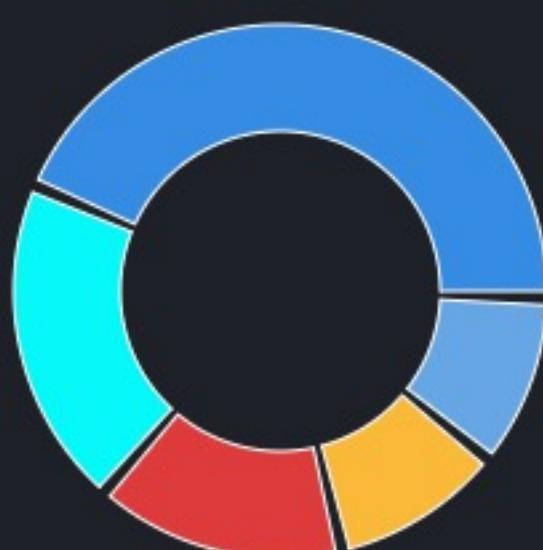
+0.5%

Portfolio Health Score

88/100

Stable

Sector Allocation



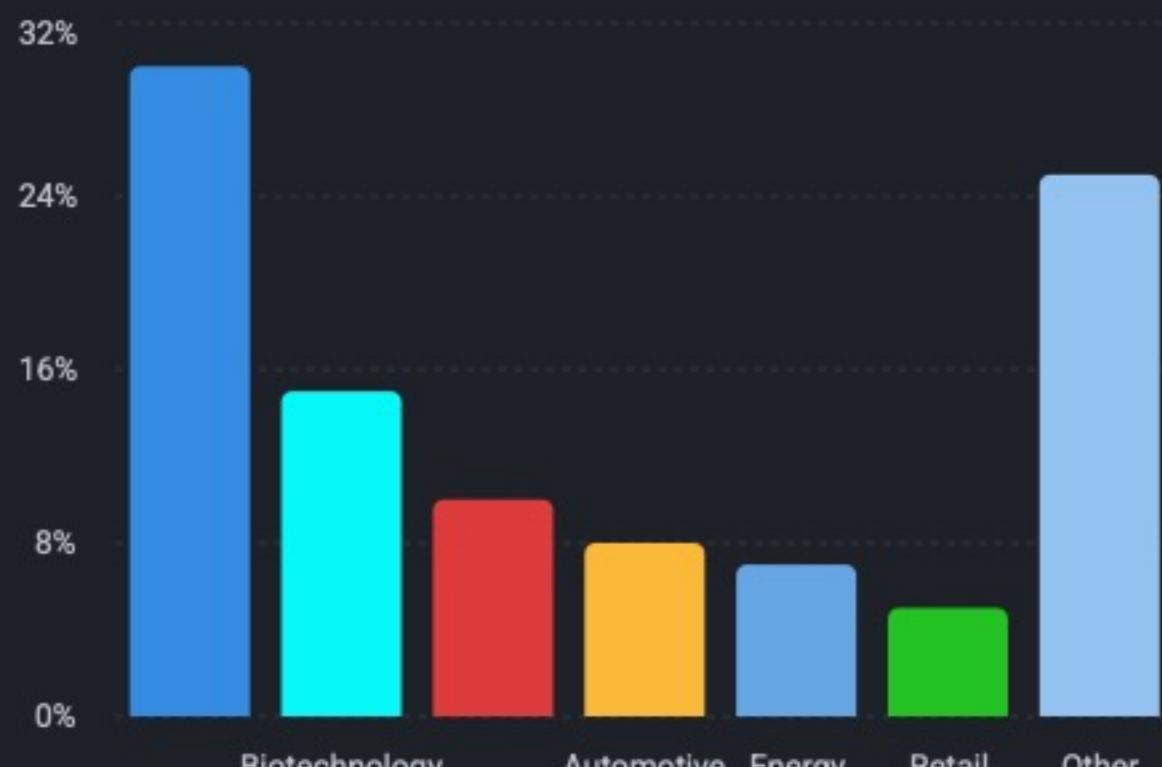
Risk Exposure (VaR)



Performance vs. Benchmark



Industry Allocation



All Holdings

Holding	Ticker	Weight	Current Value	Daily Change	Performance (YTD)
Apple Inc.	AAPL	8.2%	\$205,000	+1.2%	15.3%
Microsoft Corp.	MSFT	7.8%	\$195,000	+0.9%	12.8%
Tesla Inc.	TSLA	5.1%	\$127,500	-0.3%	8.1%
Amazon.com Inc.	AMZN	4.5%	\$112,500	+0.7%	10.5%
NVIDIA Corp.	NVDA	4.0%	\$100,000	+2.1%	22.0%