

# Recommend Fund

Summary	Market Trend	Category1	Category2	Category3	Fund	Q&A
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DXJ

Category : Japan Stock  
Asset Type : ETF  
3 Yr Return : 0.24  
3 Yr Std Dev : 0.15  
Beta : 0.46  
Upward - Sloping : -0.35  
**YTD Return : 0.36**  
Expect Low value : 0.10  
Expect High Value : 0.32

HULEX

Category : Large Value  
Asset Type : Mutual Fund  
3 Yr Return : 0.16  
3 Yr Std Dev : 0.15  
**Beta : 0.34**  
Upward - Sloping : -0.10  
YTD Return : 0.11  
Expect Low value : 0.01  
Expect High Value : 0.34

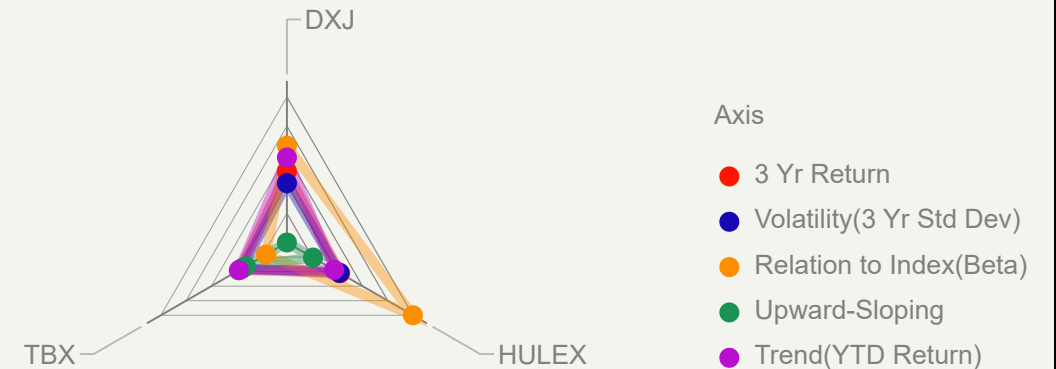
TBX

Category : Trading-Inverse Debt  
Asset Type : ETF  
3 Yr Return : 0.10  
3 Yr Std Dev : 0.10  
Beta : -0.34  
**Upward - Sloping : 0.05**  
YTD Return : 0.12  
Expect Low value : 0.02  
Expect High Value : 0.19

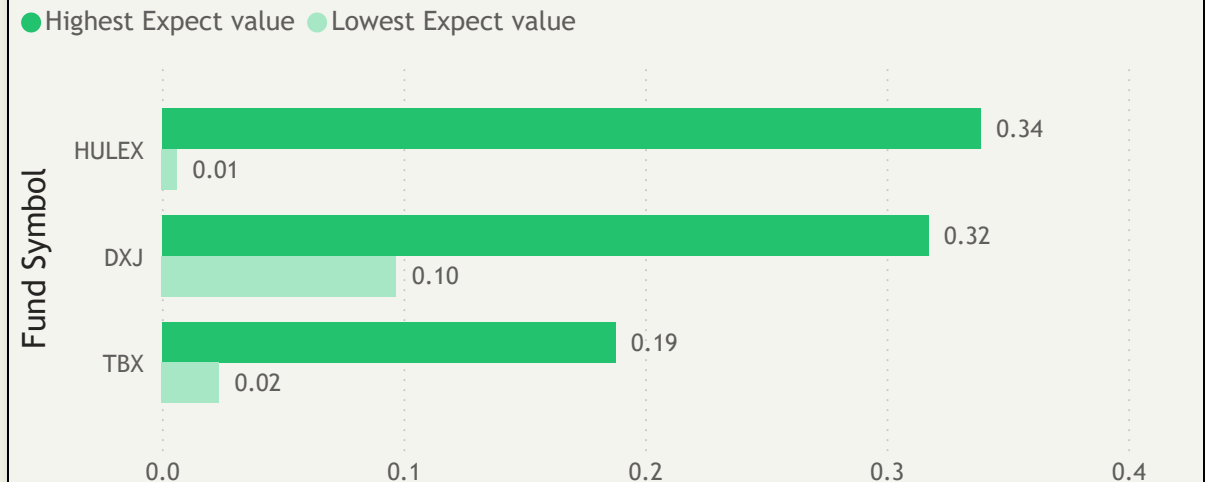
## Suggestion

When Investing 600\$ to DXJ, 800\$ to HULEX, and 600\$ to TBX for **3 years**, You can get an Average of **16%** interest. This calculation is a priority for the **stable** investment.

### Recommend Fund



### Prediction of Variance

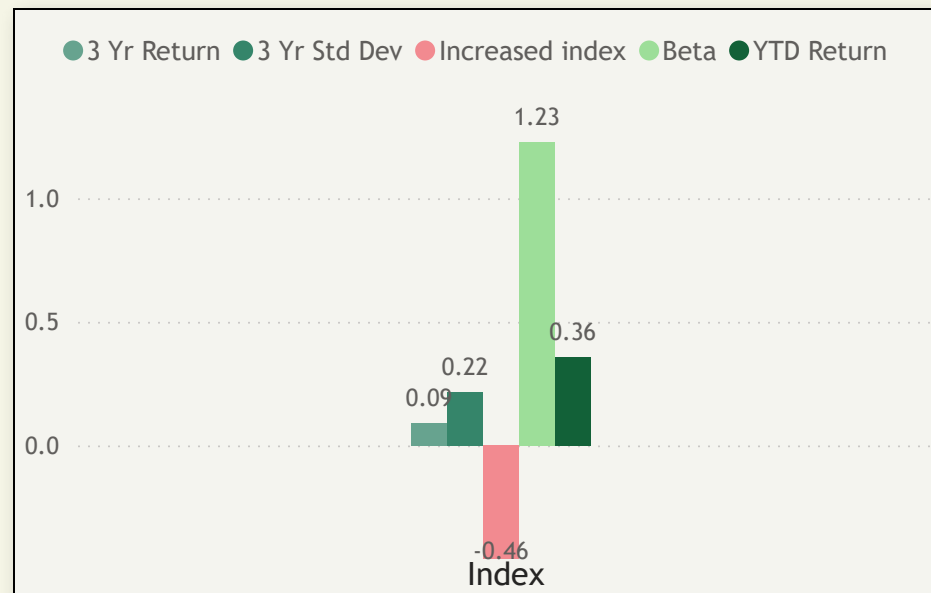


# Market Trend

The market exhibits some **instability**. Over the past two years, it maintained an overall unstable stance, making it **challenging to** anticipate **a consistent upward trend**. The current indications show a downward slope for Nasdaq at -0.46 and for S&P 500 at -0.22. Moreover, the three-year return for S&P 500 stands at a modest **9%**, and this year's return is for Nasdaq at **0.36** and S&P 500 at **0.13**.

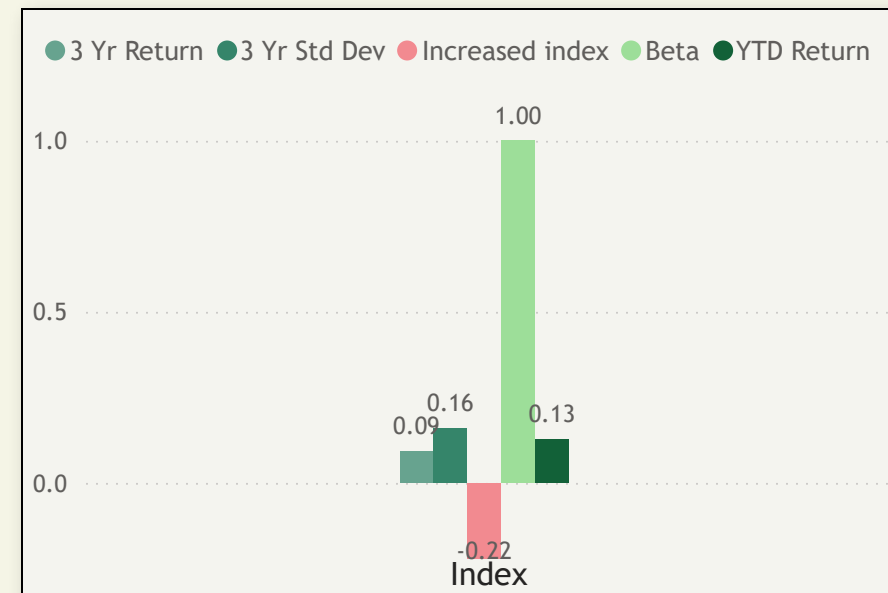
## NASDAQ

3 Yr Return : 0.09  
3 Yr Std Dev : 0.22  
Beta : 1.23  
Upward - Sloping : - 0.46  
YTD Return: 0.36



## S&P500

3 Yr Return : 0.09  
3 Yr Std Dev : 0.16  
Beta : 1.00  
Upward - Sloping : - 0.22  
YTD Return : 0.13

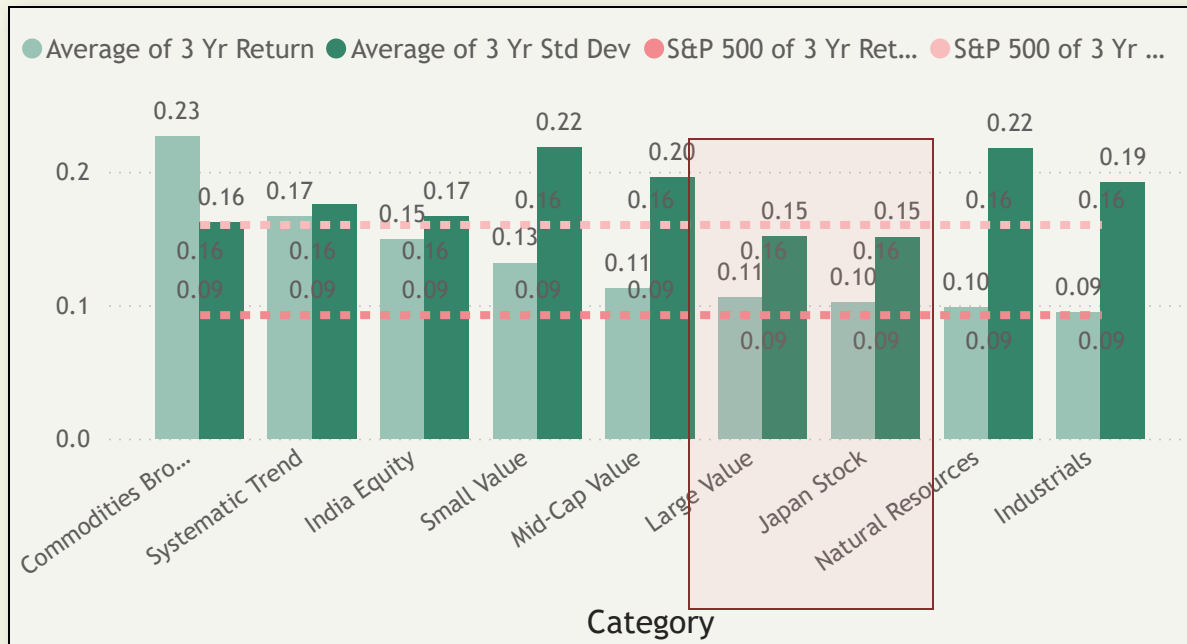


# Recommend Category

## 3 yr Return and Std Dev

3 Yr Return : > 0.09 (S&P),

3 Yr Std Dev : < 0.16 (S&P)

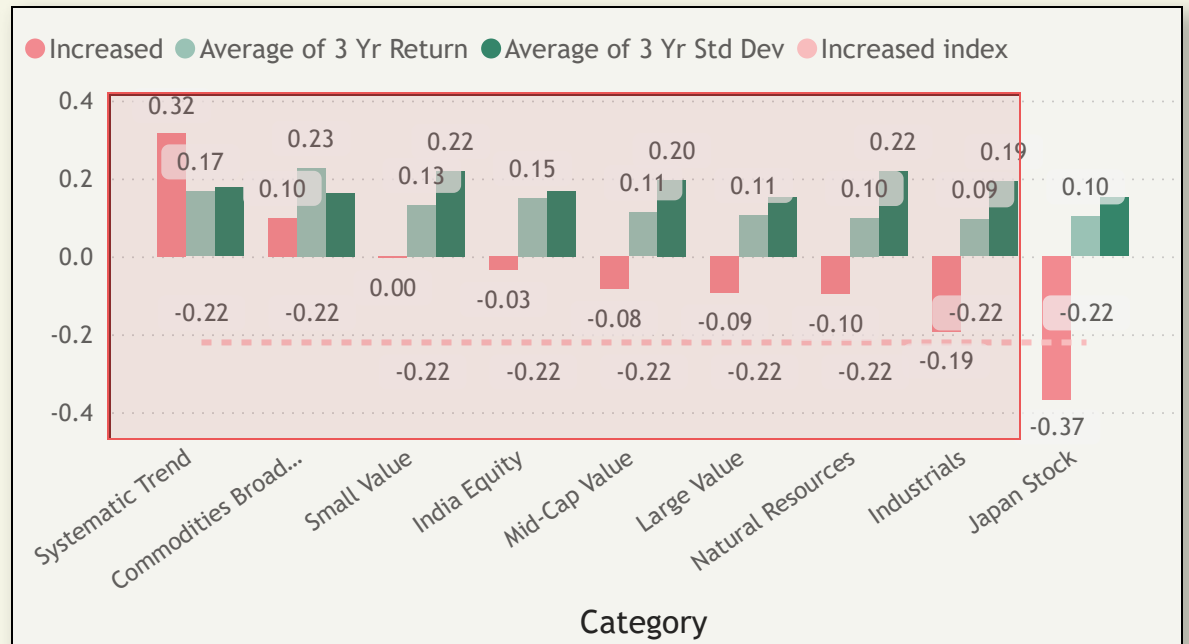


## Up-warding Slope

3 Yr Return : > 0.09 (S&P)

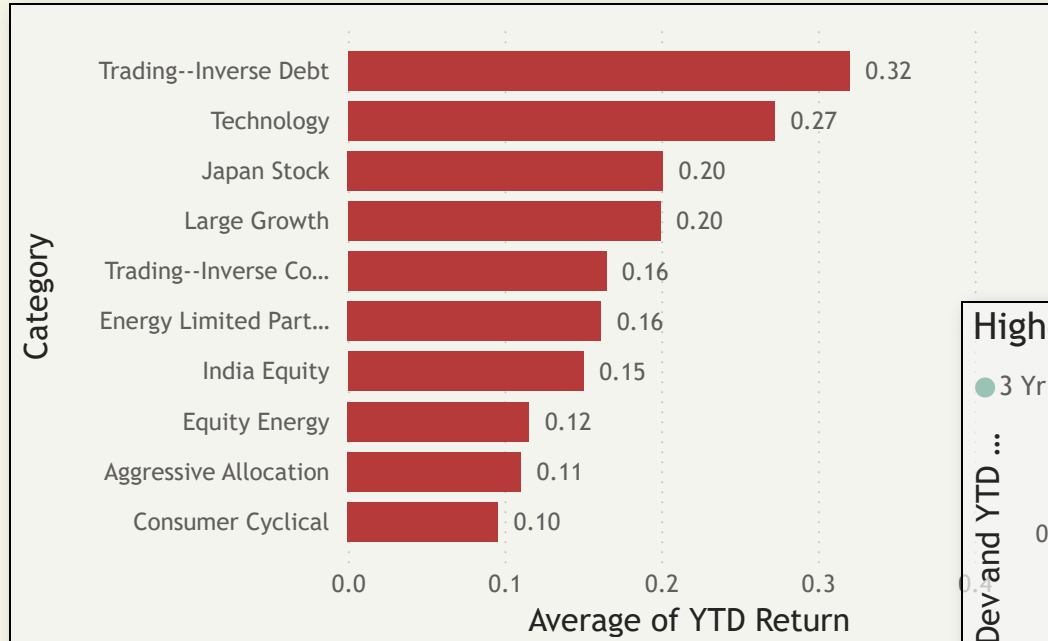
3 Yr Std Dev : < 0.16 (S&P)

UP-warding slope : > -0.22 (S&P)



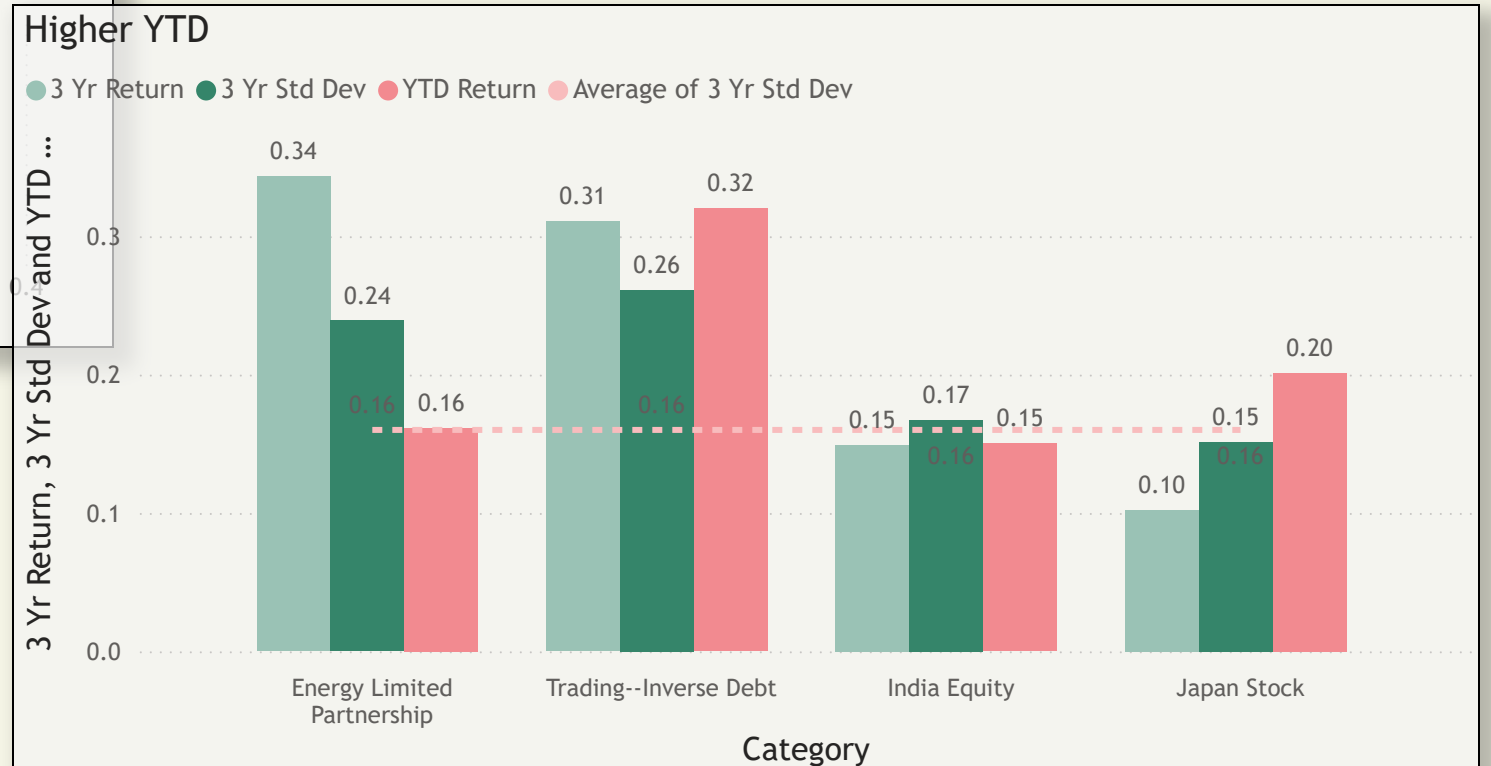
# Recommend Category

## High Return for This Year



3 Yr Return : > 0.09 (S&P) ,  
3 Yr Std Dev : < 0.16 (S&P)  
YTD Return : > 0.13 (S&P)

Although Energy Limited Partnership and India Equity exhibit greater returns than the S&P500, their investment **carries higher risk** due to the elevated standard deviation compared to the S&P



# Recommend Category



Index	Increased index	YTD Return	3 Yr Return	3 Yr Std Dev	Beta
NASDAQ Returns	-0.46	0.36	0.09	0.22	1.23
S&P 500 Returns	-0.22	0.13	0.09	0.16	1.00

Category	Increased	Average of YTD Return	Average of 3 Yr Return	Average of 3 Yr Std Dev	Average of Beta
Energy Limited Partnership	0.15	0.16 →	0.34 ↑	0.24 ↓	0.56
Trading--Inverse Debt	0.31	0.32 →	0.31 ↑	0.26 ↓	-0.55
India Equity	-0.03	0.15 →	0.15 ↑	0.17 ↑	0.55
Large Value	-0.09	0.01 ↓	0.11 ↑	0.15 ↑	0.80
Japan Stock	-0.37	0.20 →	0.10 ↑	0.15 ↑	0.45

**Japan Stock** offers stability and lower risk for earning interest, although it has less correlation with the Index. (Exercise caution when considering investments in other areas without sufficient information.)

**Large Value** exhibits a higher correlation with the index, making it a preferable choice for investment alongside Japan Stock.

**India Equity** is relatively stable but has a lower correlation with the American Market.

**Trading Inverse Debit** and **Energy Limited Partnership** present attractive opportunities for higher returns, but they come with increased risk.

From the selected category, I recommend to three fund that high stability, low risk, and trend.

## Fund Recommend

Fund Symbol	Category	Asset Type	Increased	YTD Return	3 Yr Return	3 Yr Std Dev	Beta	expect value_low	expect value_high
DXJS	Japan Stock	ETF	-0.30	0.32	0.20	0.13	0.27	0.07	0.29
DXJ	Japan Stock	ETF	-0.35	0.36	0.24	0.15	0.46	0.10	0.32
DBJP	Japan Stock	ETF	-0.24	0.29	0.16	0.15	0.53	0.02	0.32
HULEX	Large Value	Mutual Fund	-0.10	0.11	0.16	0.16	0.87	0.01	0.34
HULIX	Large Value	Mutual Fund	-0.10	0.10	0.16	0.16	0.87	0.00	0.34
TBX	Trading--Inverse Debt	ETF	0.05	0.12	0.10	0.08	-0.15	0.02	0.19

# Q & A

Summary

Market Trend


Category1

Category2

Category3

Fund

Q&A

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category

what is the gap return  
one by category

what is the gap return  
two by category

what is the gap return  
three by category