

1. Summary & Portfolio Characteristics

The provided screenshots show a portfolio consisting of equities (stocks), gold, and a mutual fund. The total current value of the portfolio is ₹15,398.00. The portfolio displays a daily profit and loss (P&L) of ₹1,389.74 (9.2%). The portfolio includes investments in individual stocks (NIFTYIETFR-EQ, GOLDBEES-EQ, MIDCAPIETF-EQ) and a mutual fund (ICICI Prudential Nifty Midcap 250 Index Fund - Growth). There is also a separate holding of physical gold, valued at ₹6,113.20.

2. Goal Alignment Grade

A goal alignment grade cannot be determined from the provided screenshots. The images only show the current portfolio holdings and values, not the investor's financial goals or risk tolerance. To assess goal alignment, information regarding the investor's objectives (e.g., retirement, education, down payment), time horizon, and risk tolerance is needed.

3. Goal Alignment Percentage

A goal alignment percentage cannot be calculated without knowing the investor's financial goals and risk profile. The provided data only reflects the current asset allocation and values, not how well those align with the investor's objectives.

4. Risk Meter

The risk meter cannot be determined from the provided information. The screenshots show the portfolio's composition, but not the investor's risk tolerance or the risk level associated with the chosen investments. A risk assessment requires additional information about the investor's financial situation and investment goals.

5. Estimated 5-Year Return

An estimated 5-year return cannot be reliably predicted based solely on the current portfolio snapshot. Market performance is unpredictable, and future returns depend on various factors including economic conditions, market volatility, and the specific performance of the individual assets in the portfolio.

6. Where You Are Strong

Based on the provided data, the portfolio shows diversification across asset classes, including equities and gold. The presence of a mutual fund (ICICI Prudential Nifty Midcap 250 Index Fund - Growth) suggests some exposure to a diversified basket of mid-cap stocks. The holding

of physical gold offers a potential hedge against inflation.

7. Where You Need to Improve

Without knowing the investor's goals and risk tolerance, it's difficult to definitively state areas for improvement. However, potential areas for consideration include: a more comprehensive financial plan that aligns investments with specific goals, a more detailed risk assessment to ensure the portfolio aligns with the investor's risk tolerance, and potentially broadening diversification beyond the current selection of assets. Further analysis of the investor's overall financial situation is required.

8. Asset Allocation Breakdown

Asset Name	Type	Invested Amount	Current Value
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MIDCAPIETF-EQ	Stock	13,406.50	13,322.50
GOLDBEES-EQ	Stock	14,794.64	15,911.54
NIFTYIETF-EQ	Stock	15,807.12	16,163.96
ICICI Prudential Nifty Midcap 250 Index Fund - Growth	Mutual Fund	14,999.74	
15,149.13			
My Gold	Physical Gold	N/A	16,113.20

****Note:**** "Invested Amount" represents the initial investment value, while "Current Value" reflects the current market value. The "My Gold" entry lacks initial investment data in the provided screenshots.