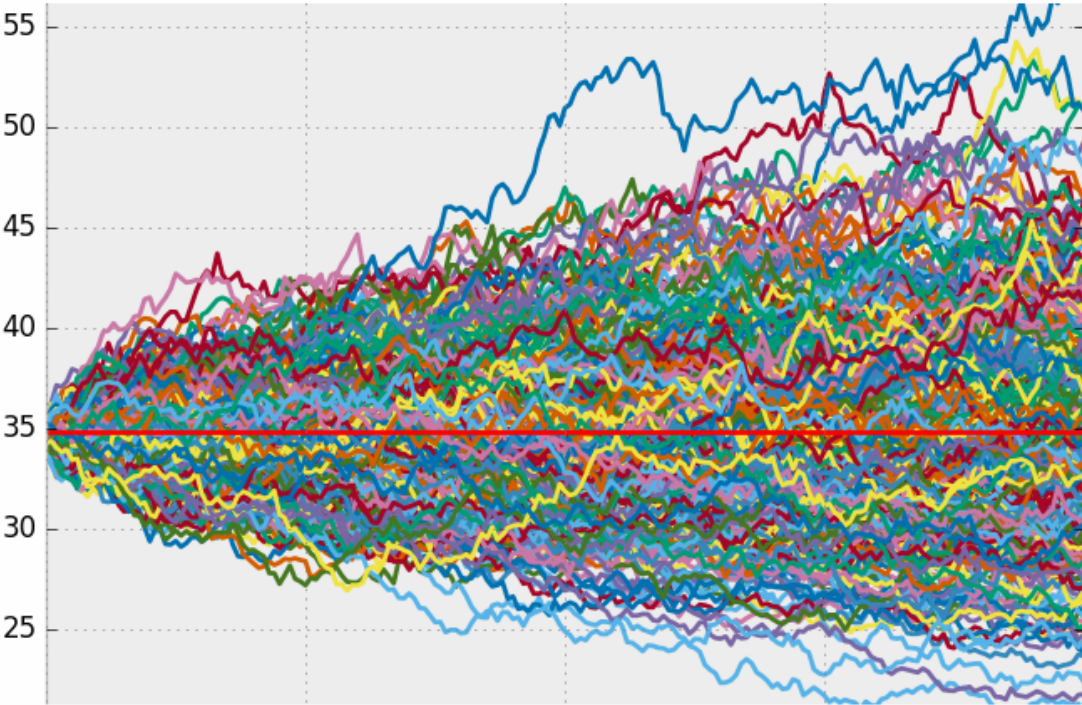


Portfolio Simulation



Load Stock List + Weights

How many stocks to input?

Stock Symbol

Weight

Stock Symbol

Weight

Stock Symbol

Weight

Start Date

/ /



Portfolio Value

Months to Sim

of Simulations

Simulate

Reset to Defaults

Load Stock List + Weights - Choose if you want to load a spreadsheet or pick a few stocks plus weights
How many stocks to input?- Only shows when manual input selection is chosen
Page is used to show a monte carlo simulation of the portfolio

Portfolio Analysis

Portfolio Standard Deviation



Portfolio Skewness



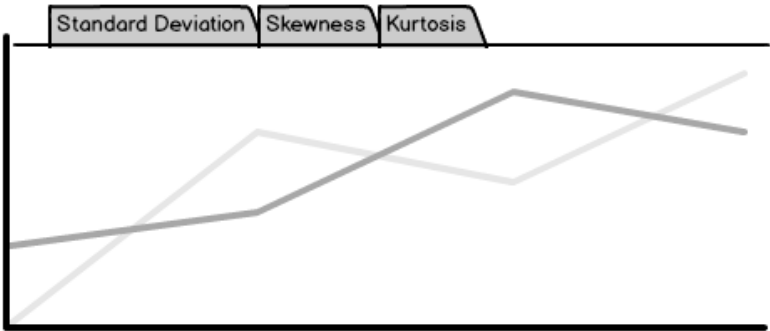
Portfolio Kurtosis



Portfolio Sharpe Ratio vs Market



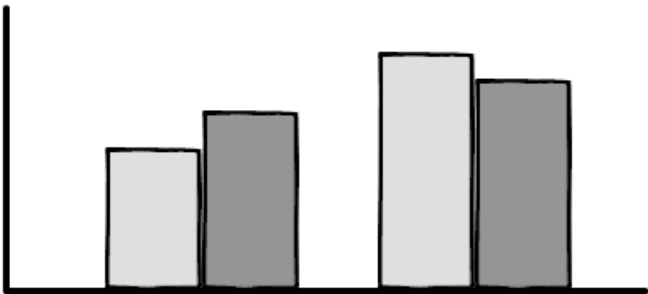
Rolling Stock Metrics



Returns by Asset

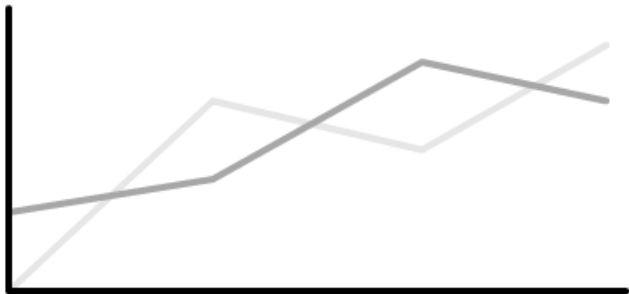


Percent Contribution to Volatility



Considered adding CAPM betas as well

Fama-French Rolling 3-Factor R^2



Load Stock List + Weights

How many stocks to input?

Stock Symbol Weight

Stock Symbol Weight

Stock Symbol Weight

Start Date

//

Window

Calculate

Reset to Defaults

Information / Disclaimer

| | | |
|----------------------|--------------------|------------------------|
| Portfolio Simulation | Portfolio Analysis | Information/Disclaimer |
|----------------------|--------------------|------------------------|

Disclaimer

ALL INFORMATION CONTAINED HEREIN IS FOR INFORMATIONAL PURPOSES ONLY AND DOES NOT CONSTITUTE AN OFFER OF ANY FINANCIAL PRODUCT OR SERVICE. THE INFORMATION IS NOT INTENDED TO BE USED AS A BASIS FOR INVESTMENT DECISIONS. THE INFORMATION IS NOT GUARANTEED TO BE ACCURATE, COMPLETE, OR UP-TO-DATE. THE INFORMATION IS NOT INTENDED TO BE USED AS A BASIS FOR INVESTMENT DECISIONS. THE INFORMATION IS NOT GUARANTEED TO BE ACCURATE, COMPLETE, OR UP-TO-DATE. THE INFORMATION IS NOT INTENDED TO BE USED AS A BASIS FOR INVESTMENT DECISIONS. THE INFORMATION IS NOT GUARANTEED TO BE ACCURATE, COMPLETE, OR UP-TO-DATE.

Purpose of App

ALL INFORMATION CONTAINED HEREIN IS FOR INFORMATIONAL PURPOSES ONLY AND DOES NOT CONSTITUTE AN OFFER OF ANY FINANCIAL PRODUCT OR SERVICE. THE INFORMATION IS NOT INTENDED TO BE USED AS A BASIS FOR INVESTMENT DECISIONS. THE INFORMATION IS NOT GUARANTEED TO BE ACCURATE, COMPLETE, OR UP-TO-DATE. THE INFORMATION IS NOT INTENDED TO BE USED AS A BASIS FOR INVESTMENT DECISIONS. THE INFORMATION IS NOT GUARANTEED TO BE ACCURATE, COMPLETE, OR UP-TO-DATE. THE INFORMATION IS NOT INTENDED TO BE USED AS A BASIS FOR INVESTMENT DECISIONS. THE INFORMATION IS NOT GUARANTEED TO BE ACCURATE, COMPLETE, OR UP-TO-DATE.

This page will just say what the app is for and isn'tAlso typical financial disclaimer (i.e. use at your own risk)