

# Portfolio Analysis

Aug 31, 2024

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Simulation Summary

<b>Your Portfolio</b>		<b>Scenario 1</b>		<b>Scenario 2</b>		<b>Scenario 3</b>	
Domestic Equity	50%	Domestic Equity	49%	Domestic Equity	48%	Domestic Equity	45%
SPY	20%	SPY	20%	SPY	20%	SPY	20%
IWM	20%	IWM	20%	IWM	20%	IWM	20%
IJH	10%	IJH	9%	IJH	8%	IJH	5%
Global Equity	20%	Global Equity	20%	Global Equity	20%	Global Equity	20%
IEFA	10%	IEFA	10%	IEFA	10%	IEFA	10%
IEMG	10%	IEMG	10%	IEMG	10%	IEMG	10%
Fixed Income	30%	Fixed Income	28%	Fixed Income	27%	Fixed Income	25%
AGG	30%	AGG	28%	AGG	27%	AGG	25%
Alternatives	0%	Alternatives	0%	Alternatives	0%	Alternatives	0%
Crypto	0%	Crypto	3%	Crypto	5%	Crypto	10%
BTC	0%	BTC	1.5%	BTC	2.5%	BTC	5%
		ETH	1.5%	ETH	2.5%	ETH	5%

Performance



Performance Returns

As of: Aug 31, 2024

	Annualized						
	1 Month	3 Months	6 Months	1 Year	3 Years	5 Years	Inception
Your Portfolio	2.08%	6.74%	8.76%	16.63%	7.55%	49.06%	78.73%
Scenario 1	1.47%	5.84%	8.35%	18.72%	9.00%	63.78%	119.83%
Scenario 2	1.06%	5.24%	8.06%	20.08%	9.84%	73.90%	151.32%
Scenario 3	0.06%	3.73%	7.28%	23.42%	11.67%	100.73%	247.59%

Statistics

	Sharpe Ratio	Standard Deviation	Max Drawdown
Your Portfolio	0.44	13.89%	-27.12%
Scenario 1	0.62	14.43%	-28.09%
Scenario 2	0.72	14.91%	-28.72%
Scenario 3	0.92	16.56%	-30.11%