

Financial Health Report

Financial Summary

Total Income: \$200.00

Total Expenses: \$-3400.00

Net Balance: \$-3200.00

Historical Data (Monthly Breakdown)

2024-01 - Income: \$0.00 | Expenses: \$-1500.00 | Net Savings: \$-1500.00

2024-02 - Income: \$0.00 | Expenses: \$-400.00 | Net Savings: \$-400.00

2025-01 - Income: \$200.00 | Expenses: \$-1500.00 | Net Savings: \$-1300.00

Top Transactions

Largest Income: \$200.00

Largest Expense: \$-1500.00

Recurring Transactions

Rent: \$-3000.00

Investment Portfolio

Total Investments: \$265,000.00

| Investment Name | Category | Amount (\$) | Current Value (\$) | ROI (%) |
|--------------------------|----------------|--------------|--------------------|---------|
| Apple Inc. | Stocks | \$10,000.00 | \$12,500.00 | 25.00% |
| Rental Property Downtown | Real Estate | \$250,000.00 | \$275,000.00 | 10.00% |
| Bitcoin | Cryptocurrency | \$5,000.00 | \$5,750.00 | 15.00% |