

3

Total No. of Clients

₹ 23K

Total Amount Invested

₹ 800

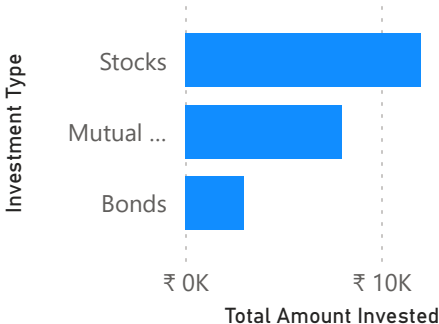
Avg. ROI

Location of Clients



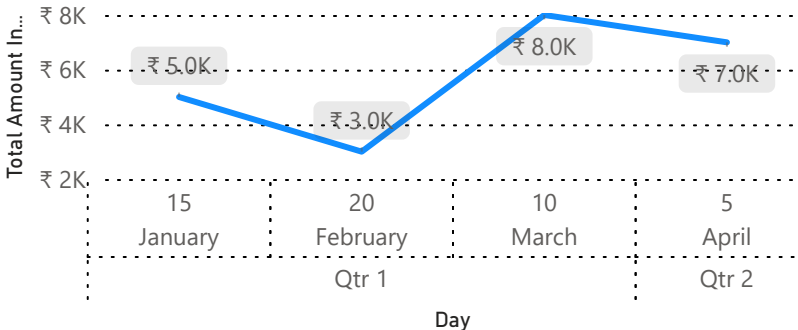
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Investment Type Distribution



Investment Summary

Total Amount Invested by Quarter, Month and Day

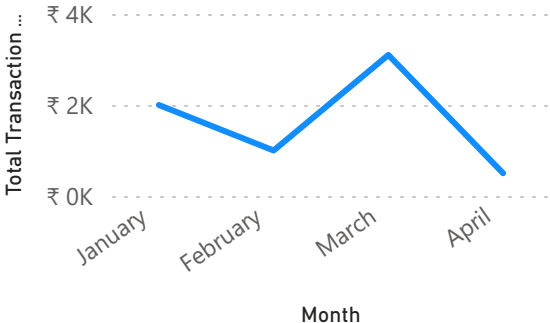


₹ 800.00

AVG. ROI

Transaction Analysis

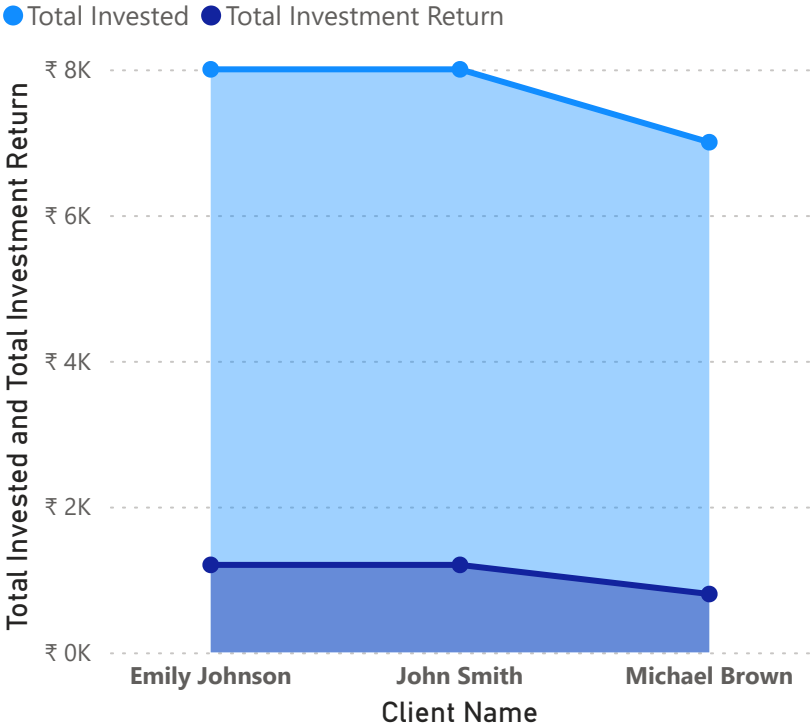
Total Transaction Amount by Month



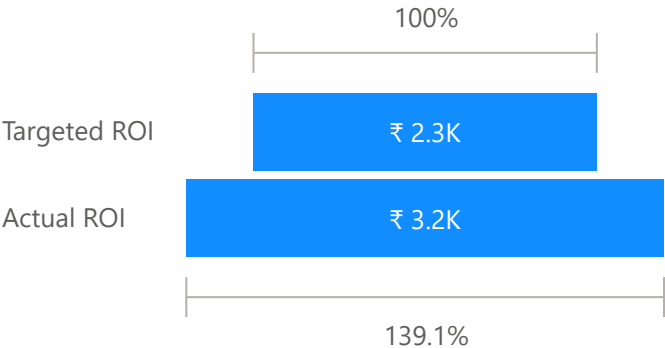
TransactionType	Transaction Amount	Month
Buy	₹ 2,000	January
Buy	₹ 3,000	March
Dividends	₹ 100	March
Sell	₹ 1,000	February
Sell	₹ 500	April
Total	₹ 6,600	

Portfolio Performance

Total Invested and Total Investment Return by Client Name



Targeted ROI and Actual ROI



Client Names

- ☐ Emily Johnson
- ☐ John Smith
- ☐ Michael Brown