

Tax report — 2024

Report period: 2024-01-01 - 2024-12-28

Assets Summary

Ticker	Currency	Dividends (PLN)	Taxes (PLN)	Net (PLN)
AAPL	USD	319.74	-47.99	271.75
KO	USD	356.92	-53.58	303.34
MA	USD	373.40	-56.04	317.36
MSFT	USD	381.53	-57.21	324.32
NESN	EUR	399.84	-59.96	339.88
PEP	USD	410.21	-61.49	348.72
RIO	GBP	383.81	-57.54	326.27
SAP	EUR	400.49	-60.08	340.41
ULVR	GBP	386.82	-57.90	328.92
V	USD	382.90	-57.44	325.46
XOM	USD	349.99	-52.49	297.50

Monthly Summary

Month	Dividends (PLN)	Tax (PLN)
2024-01	384.70	-57.64
2024-02	340.53	-51.05
2024-03	301.28	-45.24
2024-04	346.91	-52.02
2024-05	334.20	-50.18
2024-06	343.60	-51.47
2024-07	386.71	-58.02
2024-08	352.91	-52.90
2024-09	275.47	-41.30
2024-10	439.75	-66.03
2024-11	300.30	-45.05
2024-12	339.29	-50.82

Yearly Summary

Metric	Amount (PLN)
Total Dividends	4145.65
Withheld Tax (sum)	-621.72
Additional Tax (PL, 9%)	373.11
Final Net (after full 19%)	3150.82

Diagnostics

Indicator	Value
Tickers (unique)	11
Dividend rows	132
Tax rows	132

Per-currency totals (PLN)

Currency	PLN total
EUR	680.29
GBP	655.19
USD	2188.45

PIT-38 — Podsumowanie

Wyszczególnienie	Kwota (PLN)
Przychód z dywidend	4145.65
Podatek należny w Polsce (19%)	787.67
Zapłacony u źródła (10%)	-621.72
Do dopłaty w PIT-38	165.95