

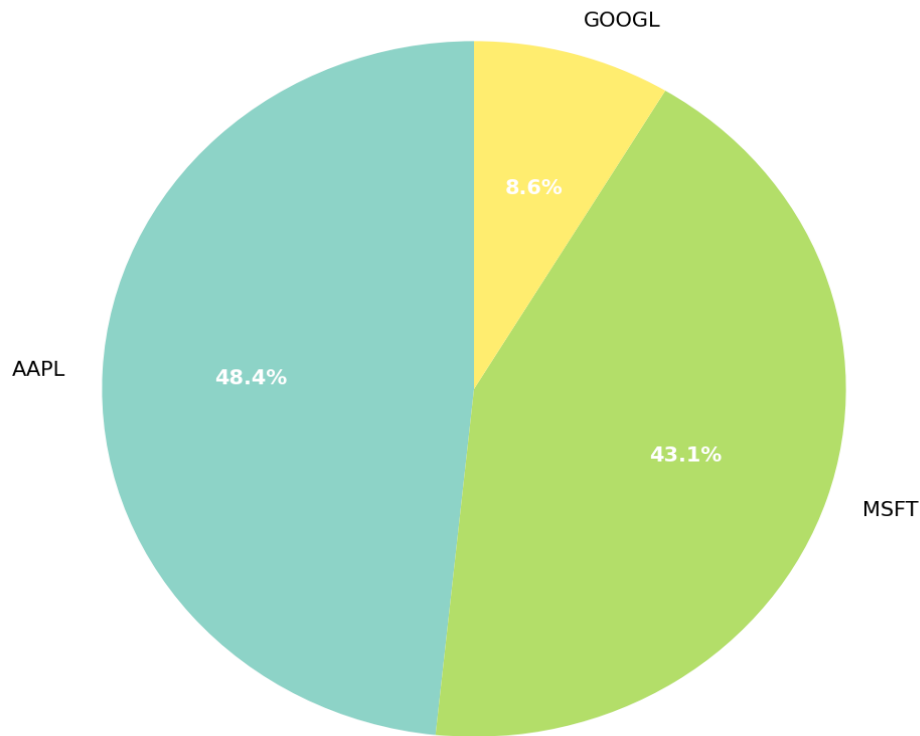
Portfolio Analysis Report

Test Portfolio

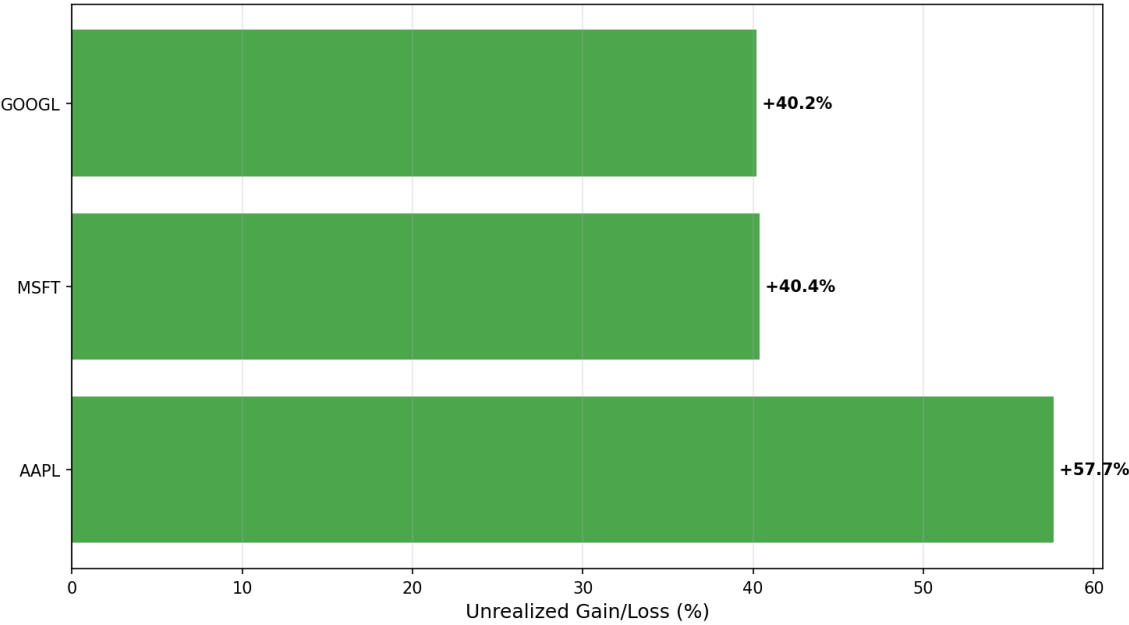
Analysis Date:	2024-12-01
Report Generated:	2025-10-10 14:01:58
Number of Positions:	3
Total Cost Basis:	\$33,000.00
Total Market Value:	\$48,911.55
Total P/L:	\$15,911.55 (+48.22%)

Portfolio Visualizations

Portfolio Allocation



Position Performance



Portfolio Overview

Portfolio Overview

Individual Stock Recommendations:

- Buy signals: 1
- Hold signals: 0
- Sell signals: 0

Risk Assessment

Portfolio Risk Assessment

Concentration Risk: HIGH

- AAPL represents 48.4% of portfolio
- Consider reducing position size

Rebalancing Suggestions

- [REDUCE] AAPL: Position represents 48.4% of portfolio - consider reducing for better diversification
- [REDUCE] MSFT: Position represents 43.1% of portfolio - consider reducing for better diversification

Individual Stock Analyses

MSFT: Analysis Failed

Error: Could not connect to tenant default_tenant. Are you sure it exists?

GOOGL: Analysis Failed

Error: Collection [bull_memory] already exists

AAPL

Decision: BUY