

The formula for CAGR Is:

$$\text{CAGR} = (\text{EV} / \text{BV})^{1 / n} - 1$$

Where:

EV = Investment's ending value

BV = Investment's beginning value

n = Number of periods (months, years, etc.)

The formula for the Sharpe Ratio (Annualized) Is:

$$= \frac{\bar{r}_p - r_f}{\sigma_p}$$

Where:

\bar{r}_p = Expected portfolio return

r_f = Risk free rate

σ_p = Portfolio standard deviation

The formula for the Sharpe Ratio (Monthly) Is:

$$\text{Sharpe} = \sqrt{12} * (\text{MeanMonthlyReturns} / \text{StdDevMonthlyReturns})$$

The formula for Present Value Is:

$$\text{PV} = \text{FV} / (1 + \text{DR}) ^ I$$

Where:

FV = Future Value

DR = Discount Rate

I = Number Of Periods Until Payment (Typically Years)

The Dividend Discount Model Is:

Sum of PV Over X Number Of Years

OR

$$\text{Infinite Time (Long Term Ownership)} = \text{FV} / ((1 + \text{DR}) - 1)$$