

# Portfolio Summary

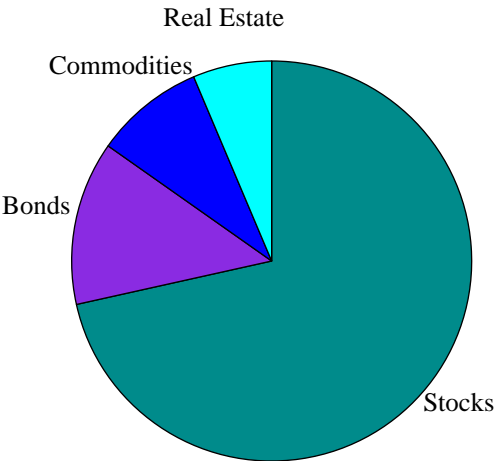
## Diversified Growth Portfolio

Total Portfolio Value	\$104,935.00
Year-to-Date Return	18.50%
Annual Return	15.20%
Volatility	12.30%
Sharpe Ratio	1.45
Maximum Drawdown	-8.30%

## Current Holdings

Symbol	Shares	Price	Value	Weight (%)
SPY	100.00	\$442.15	\$44,215.00	42.30%
TLT	150.00	\$92.30	\$13,845.00	13.30%
GLD	50.00	\$186.50	\$9,325.00	8.90%
VNQ	75.00	\$89.20	\$6,690.00	6.40%
QQQ	80.00	\$385.75	\$30,860.00	29.50%

## Asset Allocation



## **Important Disclaimer**

This report is for informational purposes only and does not constitute investment advice. Past performance is not indicative of future results. All investments carry risk, including the potential loss of principal. Consult with a qualified financial advisor before making investment decisions.