

XIRR Calculator Report

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Portfolio Summary

Metric	Value
First Investment Date	June 01, 2023
Investment Period	984 days (2.69 years)
Total Transactions	80 investments, 8 withdrawals
Total Invested	800,000.00
Total Withdrawn	75,000.00
Current Portfolio Value	835,000.00
Net Gain/Loss	110,000.00
Simple Return	13.75%
XIRR (Annualized)	11.58%

Nifty 50 Benchmark Comparison

Metric	Your Portfolio	Nifty 50
Current Value	835,000.00	815,000.00
XIRR (Annualized)	11.58%	10.25%
Performance vs Nifty 50	OUTPERFORMED by 1.33%	
Value Difference	20,000.00	
Nifty 50 Units Held		317.21
Current Nifty 50 Price		25697.50

Note: This comparison shows how your portfolio would have performed if you had invested the same amounts on the same dates in the Nifty 50 index. Withdrawals are also accounted for.

Individual Account Analysis

Account: ledger-SAMPLE1.csv

Metric	Value
Total Invested	500,000.00
Total Withdrawn	50,000.00
Current Value	525,000.00
Net Gain/Loss	75,000.00
Simple Return	15.00%
XIRR (Annualized)	12.45%

Account: ledger-SAMPLE2.csv

Metric	Value
Total Invested	300,000.00
Total Withdrawn	25,000.00
Current Value	310,000.00
Net Gain/Loss	35,000.00
Simple Return	11.67%
XIRR (Annualized)	10.15%

Account Comparison

Account	Invested	Withdrawn	Current	Gain/Loss
ledger-SAMPLE1.csv	500,000.00	50,000.00	525,000.00	75,000.00
ledger-SAMPLE2.csv	300,000.00	25,000.00	310,000.00	35,000.00
COMBINED	800,000.00	75,000.00	835,000.00	110,000.00

Generated by XIRR Calculator | <https://github.com/ankitjgd/xirrcalculator>