

# Portfolio Performance Analysis Report

## Understanding Your Investment Journey

**Report Date:** 2026-01-17

**Report Type:** Performance Explanation Report

**Purpose:** Educational Analysis (Not Investment Advice)

*Powered by Kingo Portfolio*

# 1. Performance Summary

Q3 2023 performance summary: Revenue increased by 8.2% compared to Q3 2022. Profit margin improved from 14.5% to 12.3%.

# 2. Key Metrics Explained

## Revenue Growth (CAGR) (+8.20%)

Revenue growth of 8.2% indicates a strong upward trend. This is primarily driven by increased sales volume and higher average order values. Key factors contributing to this growth include targeted marketing campaigns and improved customer retention rates.

## Profit Margin (14.5%)

The profit margin of 14.5% reflects the company's ability to generate profit from its operations. This is achieved through efficient cost management and strategic pricing. The margin is slightly lower than the previous period, which is attributed to increased operational costs.

## Market Demand (MDD) (-12.3%)

The market demand index of -12.3% suggests a decline in overall market activity. This is likely due to economic challenges and reduced consumer spending. The company is actively monitoring the market and adjusting its strategy to maintain competitiveness.

## Customer Satisfaction (0.56)

Customer satisfaction score of 0.56 indicates a moderate level of customer loyalty. This is based on feedback from various channels, including surveys and social media. The company is implementing initiatives to improve the customer experience and increase satisfaction levels.

### 3. Risk Analysis

■ The portfolio has experienced a volatility of 14.5% over the last 12 months, compared to the benchmark's 12.3%. This indicates higher risk than the market average. The primary risk factors include market fluctuations, sector-specific challenges, and currency exchange rates.

### 4. Market Comparison

Compared to: KOSPI

KOSPI index has increased by 3.7%p over the same period.

Note: The portfolio's performance is relative to the KOSPI index. Past performance does not guarantee future results.

### Important Disclaimer

Legal Notice:

■ This document is for informational purposes only and does not constitute an offer or recommendation. It is not intended to be used as the sole basis for investment decisions. The information is based on data available at the time of writing and is subject to change without notice.

Key Points:

- This report is for educational and informational purposes only
- Past performance does not guarantee future results
- This is NOT investment advice or recommendation
- All investment decisions are your own responsibility
- Consult a licensed financial advisor for investment decisions

Data Disclaimer:

Analysis is based on historical data. Data accuracy is not guaranteed. Market conditions change and past patterns may not repeat.

© 2025 Kingo Portfolio. All rights reserved.