Portfolio Performance Report

Analysis Period: 2025-01-01 to 2025-09-17

Key Performance Indicators:

- Portfolio Value: 13461.40

- Portfolio Return: 32.97%

- Portfolio Volatility: 36.18%

- Sharpe Ratio: 1.31

- Value at Risk: 472.51

S&P 500 Benchmark:

90

80

2025-01

2025-02

2025-03

2025-04

2025-05

Date

2025-06

2025-07

2025-08

2025-09

- Benchmark Return: 12.58%

- Benchmark Volatility: 21.04%

- Alpha (Excess Return): 20.39%

- Beta (Market Sensitivity): 1.51



Portfolio vs S&P 500 (Indexed to 100)