

# Investment Performance Report

Client: John Doe

Account Number: JD001

Report Date: August 14, 2023

## Investment Summary:

Initial Investment: \$10,000.00

Current Value: \$10,730.00

Performance: +7.3%

Duration: 1 Year

## Investment Breakdown:

| Investment Type | Amount     | Current Value | Performance |
|-----------------|------------|---------------|-------------|
| Stocks          | \$5,000.00 | \$5,600.00    | +12%        |
| Bonds           | \$3,000.00 | \$3,090.00    | +3%         |
| Mutual Funds    | \$2,000.00 | \$2,040.00    | +2%         |

### Notes:

- Past performance is not indicative of future results.
- Diversifying investments does not ensure against market loss.
- It's important to review your investment strategy periodically.