

**Market Data Analysis Worksheet**

**Introduction**

This worksheet is designed to help you organize and analyze live market data. Use it to identify key trends, assess their implications for client portfolios, and structure actionable insights. Follow the guiding questions in each section to align your findings with Horizon Capital’s goals.

**Section 1: Key Market Metrics**

**Instructions:** Fill in the table below with the most critical market metrics from the provided dataset. Use this section to identify trends and anomalies.

|  |  |  |
| --- | --- | --- |
| **Metric** | **Value** | **Observation** |
| **Renewable Energy Growth** |  | **Example:** Consistent growth aligns with client’s long-term growth objectives. |
| **Technology Decline** |  | **Example:** Volatility is high; consider reducing short-term exposure. |
| **Real Estate Stability** |  | **Example:** Stable performance supports portfolio stability. |
| **VIX (Volatility Index)** |  | **Example:** High volatility indicates market uncertainty and potential risks. |
| **Interest Rates** |  | **Example:** Rising rates could impact growth in sectors like Technology. |

**Section 4: Recommendations Summary**

**Guiding Questions:**

1. What are the top three actions Horizon Capital should take?
2. How do these actions align with their goals of agility and long-term growth?

**Actionable Recommendations:**

1.

2.

3.

**Section 5: Supporting Data**

**Instructions:** Use this space to list key data points or trends that support your recommendations. Ensure your analysis is data-driven and aligns with Horizon Capital’s risk tolerance and objectives.

1.

2.

3.

**This worksheet is your tool for breaking down complex market data into actionable insights. Use it to ensure your analysis is thorough, structured, and aligned with client objectives.**