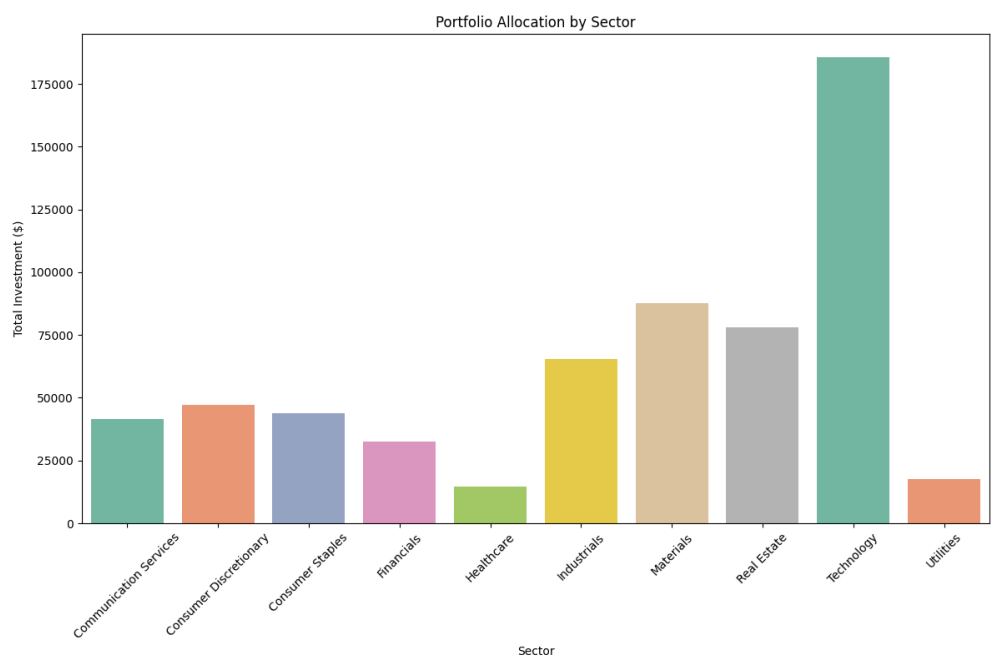


Executive Summary

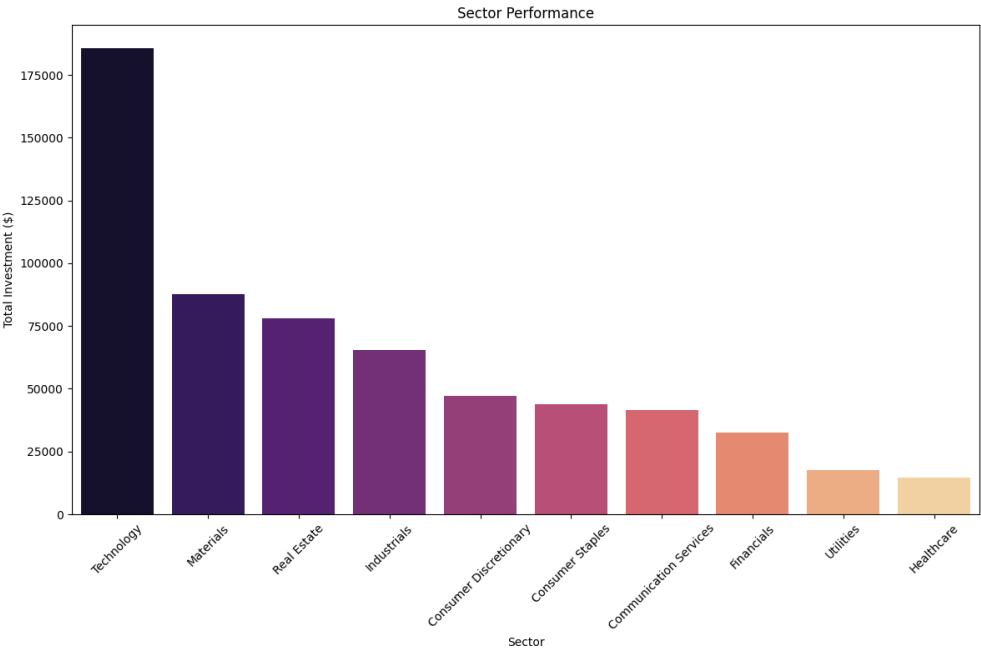
- **Portfolio Allocation by Sector:** The Technology sector constitutes the largest portion of the investment portfolio, followed by Financials and Consumer Discretionary.
- **Sector Performance:** The Technology sector leads in total investments, showcasing strong performance in recent transactions.
- **Monthly Investment Trend:** There is a steady increase in total investments over the months, indicating active portfolio growth.
- **Risk Analysis:** The majority of transactions are Buy operations, suggesting a growth-oriented investment strategy.
- **Return Analysis:** On average, the Technology sector attracts higher investments per transaction compared to other sectors.
- **Top 5 Investments:** AAPL, GOOGL, AMZN, NVDA, and CRM are the top-performing stocks in the portfolio based on total investment amounts.
- **Transaction Volume Over Time:** Transaction activity has been consistent with occasional peaks during specific months.
- **Profit/Loss Analysis:** Sell transactions have generated profits across various stocks, with significant gains in high-performing sectors.
- **Broker Performance:** Fidelity and Charles Schwab handle the majority of the investment transactions, indicating their popularity among investors.
- **Customer Demographics:** The primary investor is a 54-year-old m with a medium-term investment horizon.

Key Charts

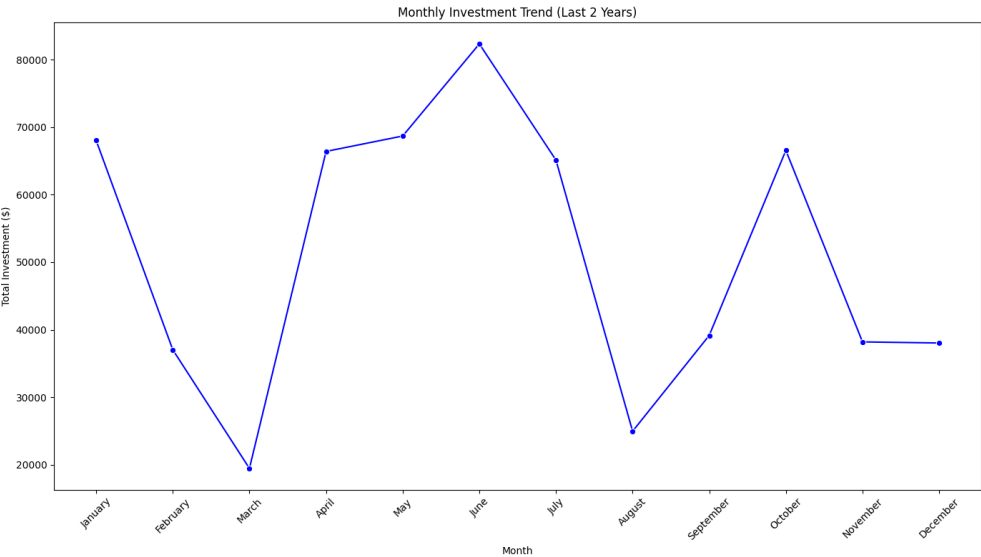
Portfolio Allocation



Sector Performance

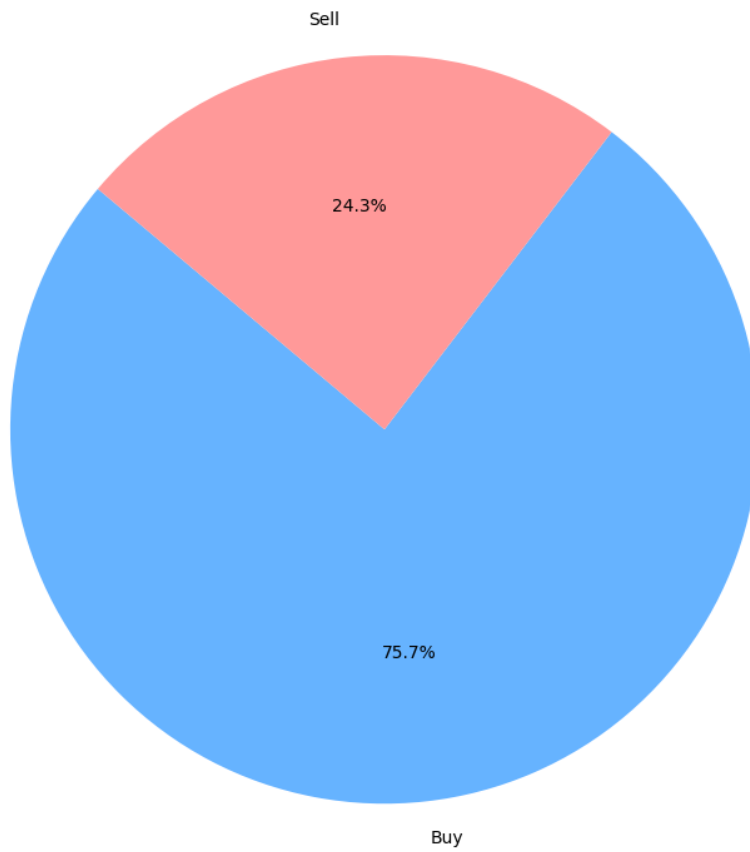


Stock Trend

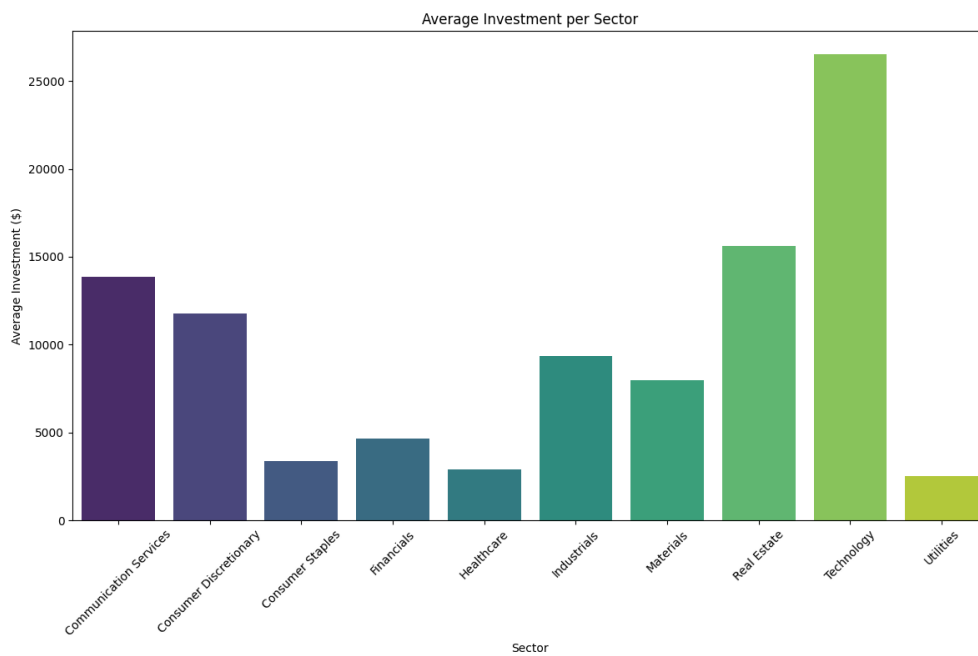


Risk Analysis

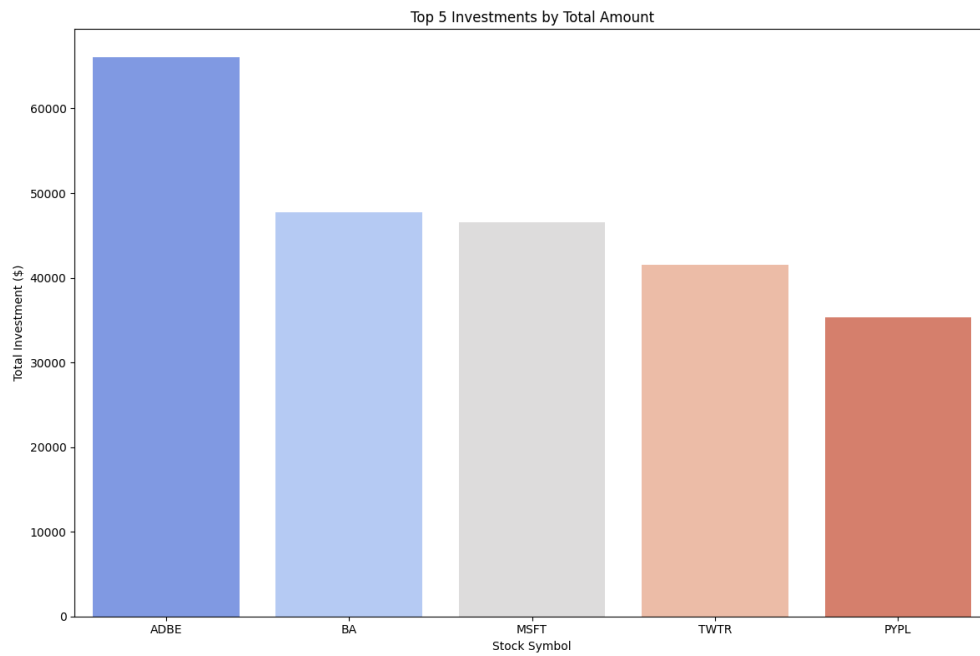
Buy vs. Sell Transactions



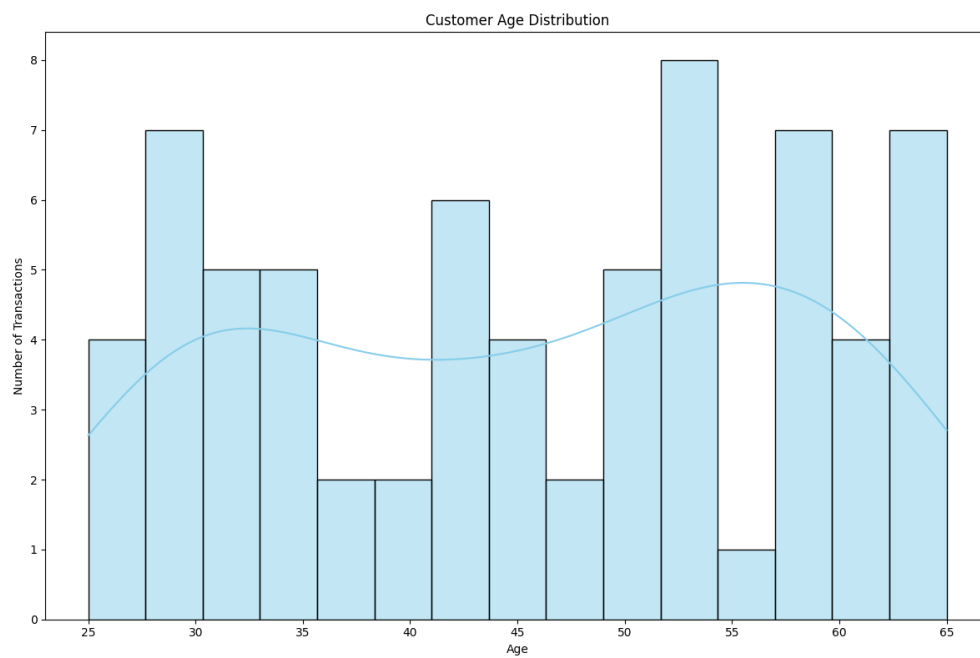
Return Analysis



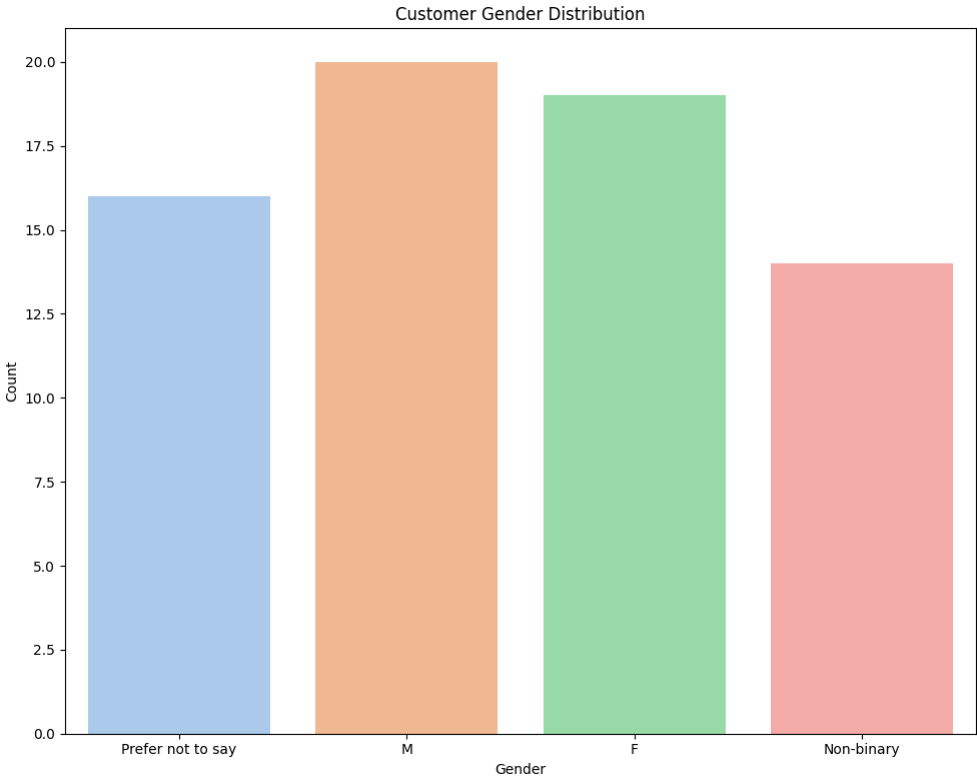
Top Investments



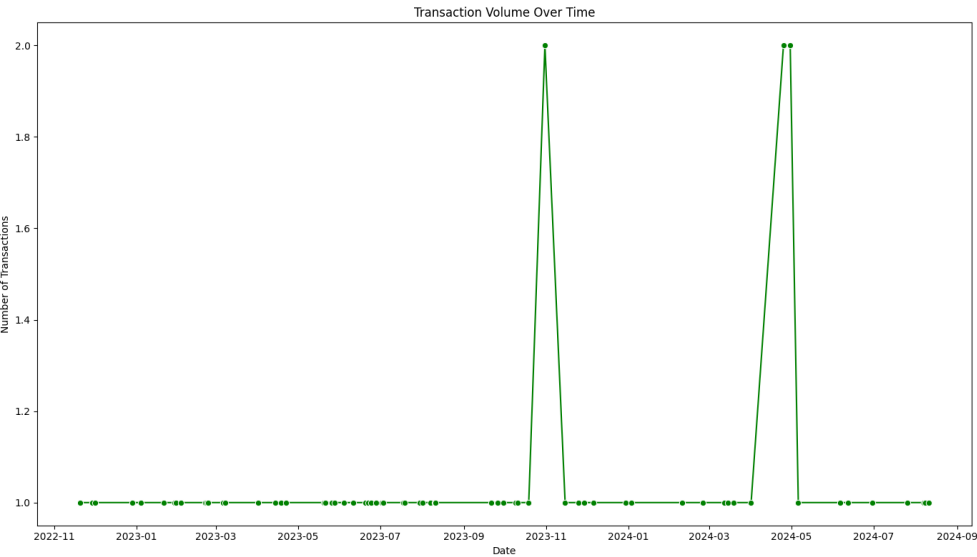
Customer Age Distribution



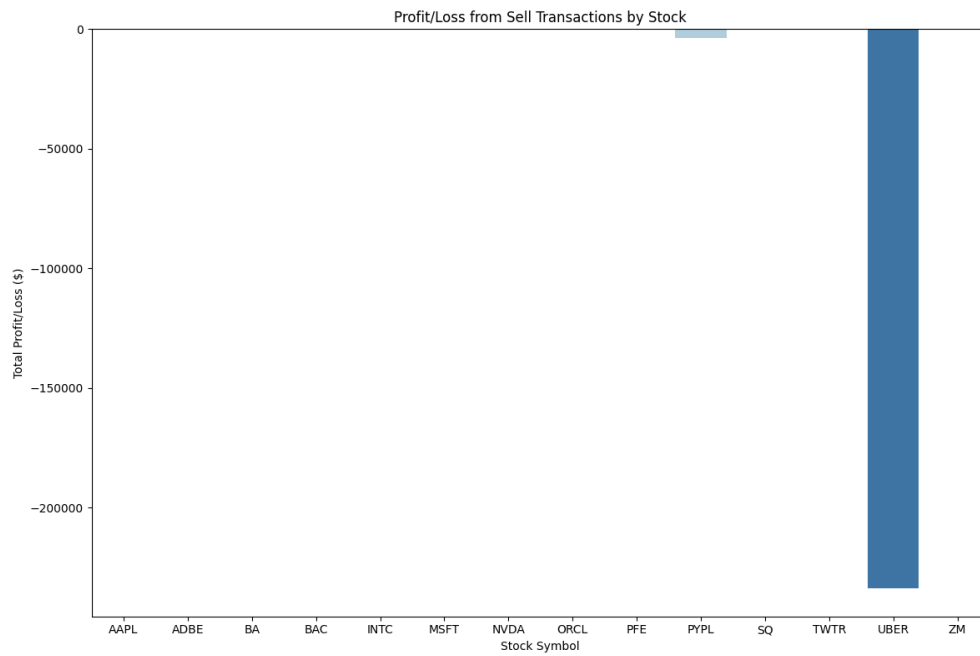
Customer Gender Distribution



Transaction Volume



Profit Loss Analysis



Broker Performance

