

Account Performance Report

Brokerage (ID: 106)

Generated: April 22, 2025

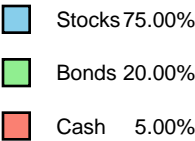
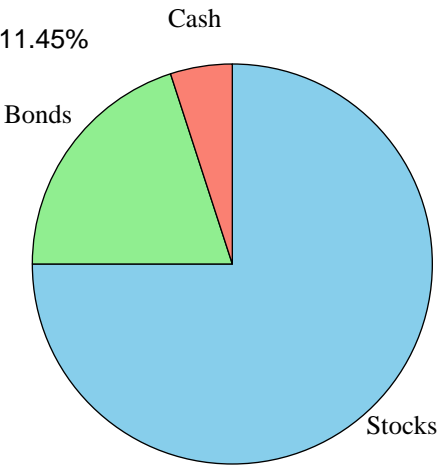
Account Information

Account Type:	Brokerage
Opening Date:	2019-02-28T00:00:00
Current Balance:	\$350,000.00
Currency:	USD

Performance Metrics

YTD Return:	6.22%
1-Year Return:	8.70%
3-Year Return (Annualized):	2.90%
5-Year Return (Annualized):	6.07%
Volatility:	2.51%
Maximum Drawdown:	-11.45%

Asset Allocation



Recent Account Activities

Date	Type	Description	Amount
2023-03-10	Buy	Purchase - AMZN	\$-6,000.00
2023-01-30	Deposit	Contribution	\$5,000.00