

Linvest21 Inc.

123 YOUR STREET
YOUR CITY, ST 12345
(123) 456-7890
NO_REPLY@EXAMPLE.COM

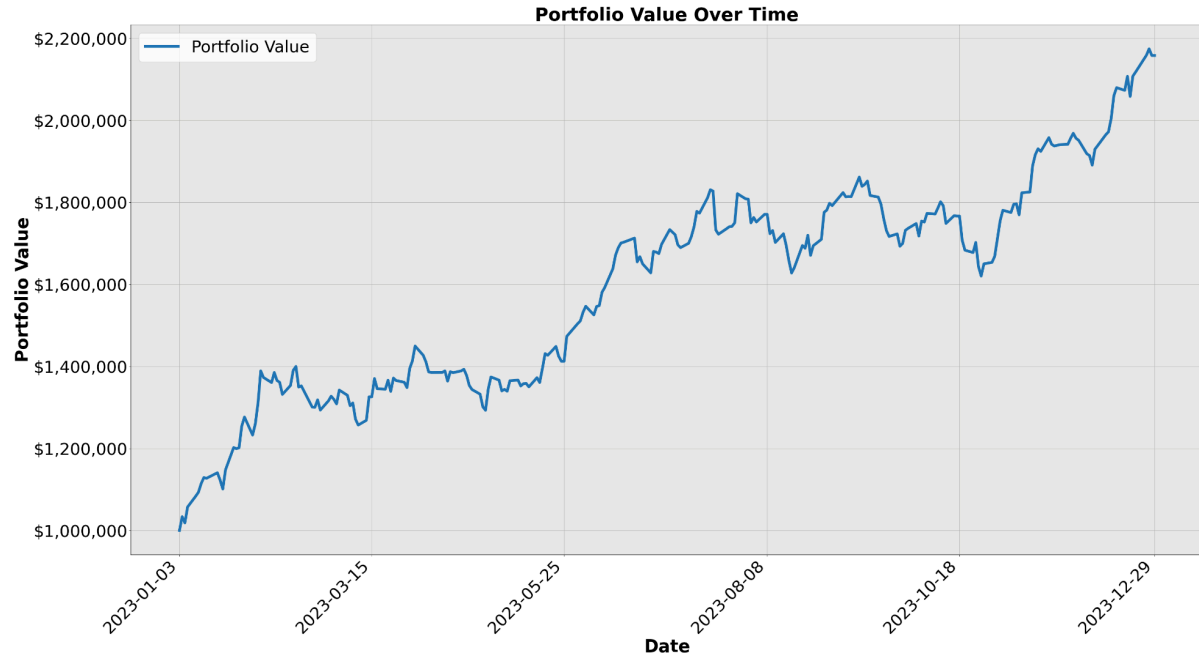
March 31, 2024

Abstract:

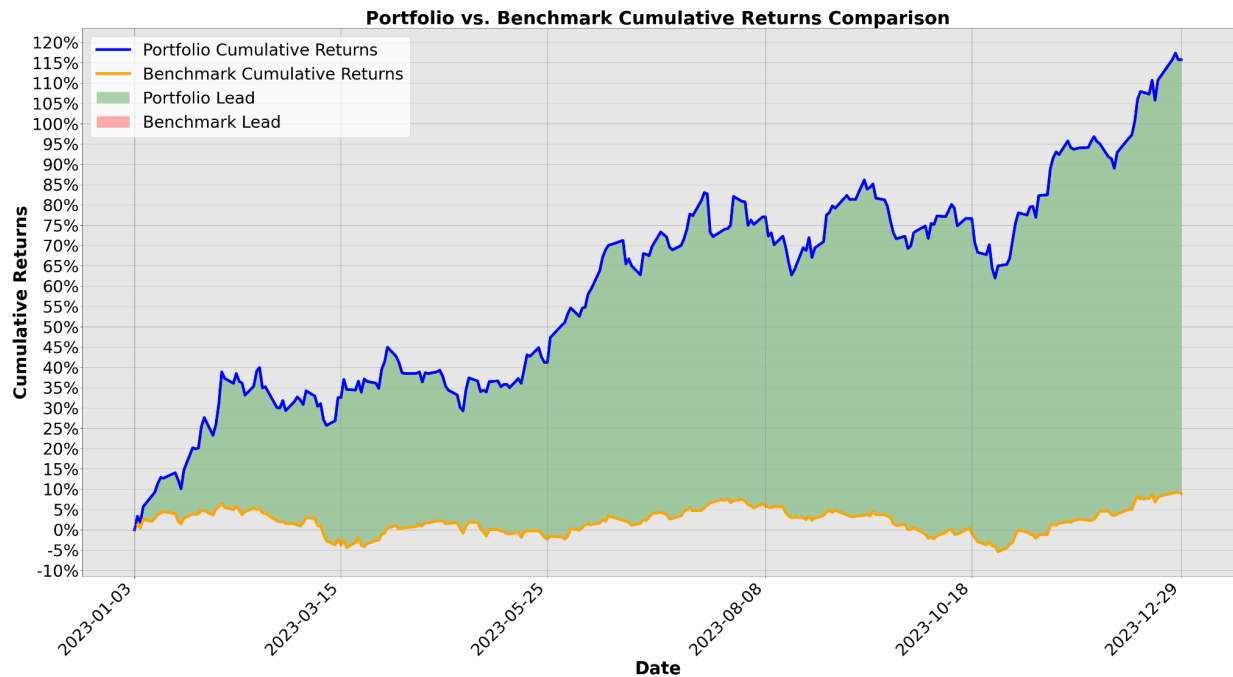
As of December 29, 2023, your portfolio has achieved significant growth, more than doubling in value since your initial investment on January 3, 2023. We have consistently outperformed the Russell 1000 benchmark, demonstrating our ability to generate superior returns for your investment. While we have delivered strong results, we remain vigilant and acknowledge that past performance is not indicative of future returns. Rest assured, we are committed to managing your investments with utmost care and expertise, always keeping your long-term financial well-being as our top priority.

Dear valued client,

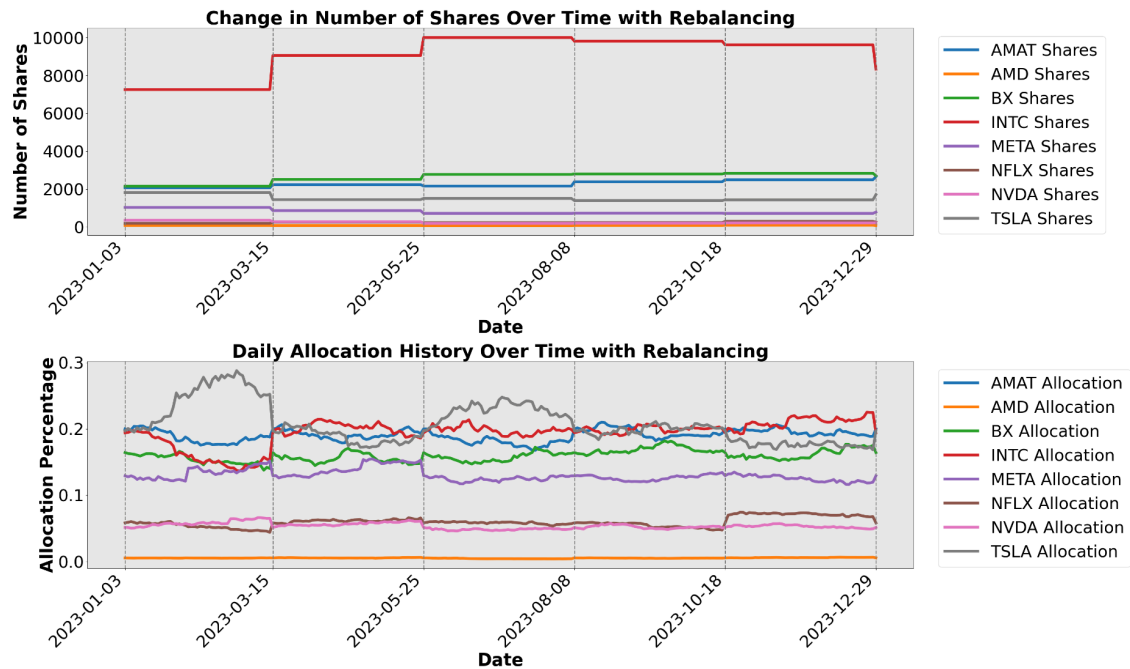
I hope this message finds you well. I wanted to take a moment to provide you with a detailed update on the performance of your investment portfolio.



As of December 29, 2023, your portfolio's absolute value stands at \$2,157,844.44. This represents a substantial growth of 115.78% from the initial investment of \$1,000,000 on January 3, 2023. The overall trend of your portfolio value has been strongly positive, more than doubling over the year.



When comparing your portfolio's performance to the Russell 1000 benchmark, we can see that your portfolio has consistently outperformed the benchmark. The spread between your portfolio's cumulative returns and the benchmark's cumulative returns has widened over time, indicating that your portfolio has generated superior returns relative to the market.



Regarding the composition of your portfolio, we have made strategic adjustments to the number of shares held in various securities over time. These adjustments are made as part of our rebalancing strategy, which aims to maintain an optimal risk-return profile. The chart shows the changes in the number of shares for different securities, such as AMAT, AMD, BX, INTC, META, NFLX, NVDA, and TSLA. The bottom portion of the chart illustrates the daily allocation history, reflecting the weight of each security in your portfolio over time.

It's important to note that we regularly monitor and rebalance your portfolio to ensure it remains aligned with your investment objectives and risk tolerance. The rebalancing dates are visible in the allocation history chart, indicating the points at which we made adjustments to maintain the desired asset allocation.

While we are pleased with the strong performance achieved thus far, it's essential to remember that past performance does not guarantee future results. Financial markets can be unpredictable, and there may be periods of volatility and temporary declines. However, we remain committed to managing your investments with prudence and expertise, focusing on your long-term financial goals.

If you have any questions or would like to discuss your portfolio in more detail, please don't hesitate to reach out to me. I am always available to address your concerns and provide further insights.

Thank you for your continued trust and confidence in our asset management services.

Best regards,

Your Asset Manager