

Stock Market Snapshot No. 51

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QUICK FACTS (SIMULATED)

- Sector lens: Consumer Discretionary • Region lens: US
- Market breadth (advancers/decliners): 1415/1168
- Volatility proxy (simulated): 13.3
- 52-week breadth: 10.4% at highs, 21.4% at lows
- Turnover (simulated): 5.1x daily average

CONCEPT SPOTLIGHT: Sharpe Ratio

Sharpe ratio gauges return per unit of volatility using excess returns over a risk-free rate.

SIMULATED MICRO-PERFORMANCE

- QGR: weight 13.2%, 1M return -10.1%, vol 40.0%
- OKCO: weight 10.8%, 1M return 8.9%, vol 41.0%
- WASY: weight 20.1%, 1M return 5.2%, vol 54.0%
- JXA: weight 26.4%, 1M return -5.3%, vol 53.0%
- PVJO: weight 29.5%, 1M return 3.3%, vol 12.0%

Weighted 1M return (simulated): 0.25%

Naive aggregated volatility (simulated): 19.33%

STRATEGY SNIPPET

Value investing: Consider rules, costs, and risk controls. Backtests are not guarantees of future results.

DID YOU KNOW?

Sector leadership tends to rotate over cycles.

GLOSSARY

- Free Float: Shares available for public trading, excluding locked-up holdings.
- Circuit Breaker: Trading halt mechanisms triggered by sharp market moves.

IMPORTANT

All numbers above are simulated/illustrative and not investment advice. Markets involve risk, including loss of principal.