Client Name: Alex Wong
Portfolio Report Date: 2023-12-01

Summary of Holdings:

1. Apple Inc. (AAPL)
   - Purchase Date: 2023-05-10
   - Purchase Price: $125.00
   - Shares: 50
   - Current Allocation: 28%

2. Tesla Inc. (TSLA)
   - Purchase Date: 2023-04-20
   - Purchase Price: $170.00
   - Shares: 30
   - Current Allocation: 24%

3. Nvidia Corp. (NVDA)
   - Purchase Date: 2023-06-15
   - Purchase Price: $390.00
   - Shares: 10
   - Current Allocation: 18%

4. Meta Platforms (META)
   - Purchase Date: 2023-02-10
   - Purchase Price: $180.00
   - Shares: 25
   - Current Allocation: 15%

5. Amazon.com (AMZN)
   - Purchase Date: 2023-01-15
   - Purchase Price: $95.00
   - Shares: 20
   - Current Allocation: 15%

Total Investment Value: $45,000

Advisor Comments:
This portfolio is tech-heavy, with a strong leaning toward growth stocks. Diversification into other sectors is recommended. Monitor TSLA closely due to volatility. NVDA and META are showing strong trends. Hold AAPL and consider accumulating more if sentiment remains positive.