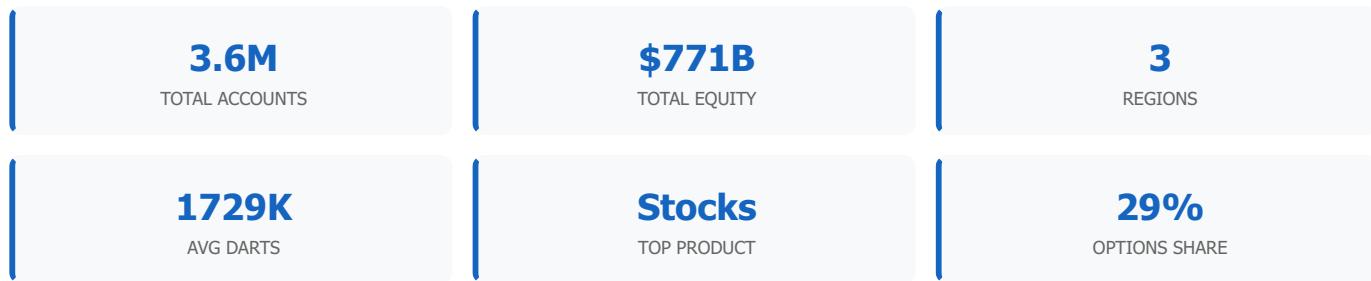


BRK02: Institutional Brokerage Study

Executive Summary | February 01, 2026

Key Performance Indicators



Stock Performance Summary

Metric	Value	Interpretation
Total Return (10.0Y)	911.5%	Cumulative appreciation
Annualized Return	26.1%	Geometric mean annual
Volatility	32.9%	Annualized std dev
Sharpe Ratio	0.79	Risk-adjusted return
Max Drawdown	-55.1%	Peak-to-trough

Data Coverage

Company: Interactive Brokers (IBKR)
Analysis Period: 2016-02-03 to 2026-01-30
Total Data Points: 13,708
Data Sources: Yahoo Finance (stock), synthetic operational metrics
Focus: Professional trading and margin lending

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Portfolio Sample - Demonstrates data engineering methodology | Generated: 2026-02-01 00:57:53