

# BRK02: Institutional Brokerage Study

Executive Summary | February 01, 2026

## Key Performance Indicators

3.6M TOTAL ACCOUNTS	\$771B TOTAL EQUITY	3 REGIONS
1729K AVG DARTS	Stocks TOP PRODUCT	29% OPTIONS SHARE

## 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