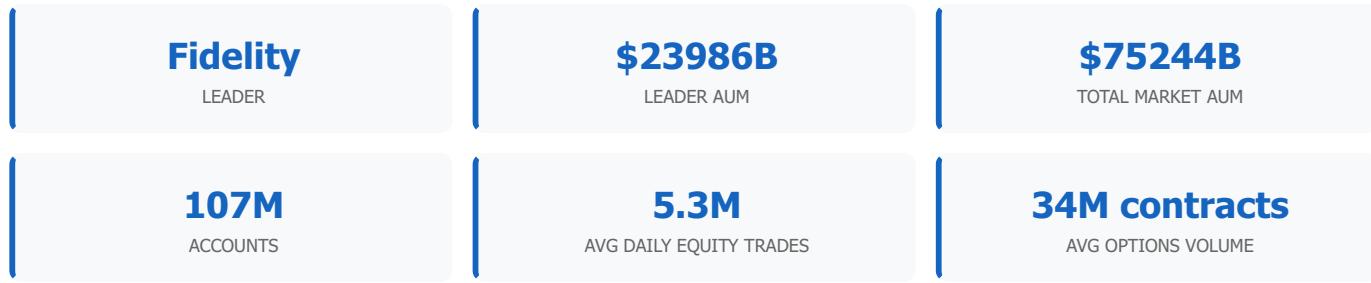


BRK01: Retail Brokerage AUM Analysis

Executive Summary | February 01, 2026

Key Performance Indicators



Stock Performance Summary

Metric	Value	Interpretation
Total Return (10.0Y)	383.3%	Cumulative appreciation
Annualized Return	17.1%	Geometric mean annual
Volatility	33.5%	Annualized std dev
Sharpe Ratio	0.51	Risk-adjusted return
Max Drawdown	-51.1%	Peak-to-trough

Data Coverage

Company: Charles Schwab (SCHW)
Analysis Period: 2016-02-03 to 2026-01-30
Total Data Points: 19,656
Data Sources: Yahoo Finance (stock), synthetic operational metrics
Focus: Retail wealth management and AUM trends

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Portfolio Sample - Demonstrates data engineering methodology | Generated: 2026-02-01 00:57:52