

BRK04: Full-Service Brokerage Economics

Executive Summary | February 01, 2026

Key Performance Indicators

Fidelity LEADER	\$24656B LEADER AUM	\$74104B TOTAL INDUSTRY AUM
93.9% AVG RETENTION	Wealth Management TOP SERVICE	34% WEALTH MGMT SHARE

Stock Performance Summary

Metric	Value	Interpretation
Total Return (59.8Y)	32172.3%	Cumulative appreciation
Annualized Return	10.1%	Geometric mean annual
Volatility	28213.4%	Annualized std dev
Sharpe Ratio	0.00	Risk-adjusted return
Max Drawdown	-99.3%	Peak-to-trough

Data Coverage

Company: Fidelity (FNF)
Analysis Period: 2016-02-03 to 2026-01-30
Total Data Points: 16,673
Data Sources: Yahoo Finance (stock), synthetic operational metrics
Focus: Integrated financial services platform

Report prepared by Mboya Jeffers | MboyaJeffers9@gmail.com
Portfolio Sample - Demonstrates data engineering methodology | Generated: 2026-02-01 00:57:53