

Year-to-Date Portfolio Report

Portfolio Value	\$291,290.00
Total Return	+14.5%
Period	YTD 2024
Sharpe Ratio	1.35
Max Drawdown	-12.3%

Top Holdings

Symbol	Shares	Value	Weight
BAM	850	\$55,250	19.0%
CNR	150	\$20,700	7.1%
BRK.B	50	\$18,500	6.4%
CSU	10	\$17,520	6.0%
HHC	200	\$16,300	5.6%