

Investment Performance Summary (Q1-Q4 2024)															Risk & Compliance Overview														
Time Period	Net Monthly Income (€)	Leverage Spread (p)	Investment/Savings (€)	Correlation Assets (p)	Debt Remaining (€)	Emergency Fund Size (€)	Liquidity % (Cash/Inv)	Worth vs Liability Ratio	% Lifestyle Inflation	Cognitive Pattern Risk	Emotional Stability Index	Growth Opportunity Readiness	Tax Savings Realized (€)	Dependence/Family Responsibility Index															
Month 1-3	1,75,000	70,000	1,05,000	3.15,000	9,30,000		80% 10:1	80% High Impulsivity risk	Low	Low	Low	Low	5,000	Low															
Month 3-6	1,75,000	70,000	1,05,000	3,45,000	7,50,000	1,00,000	70% 10:1	20% Stagnant overconfidence	Improving	Low	Low	Low	40,000	Low															
Month 6-9	1,75,000	70,000	1,05,000	9,90,000	5,70,000	1,00,000	80% 10:1	2% ADHD distraction risk	Stable	Medium	Medium	Medium	20,000	Medium															
1 Year	1,75,000	70,000	1,05,000	11,50,000	1,20,000	2,00,000	20% 10:1	2% Normal complacency risk	Stable	Medium	Medium	Medium	40,000	Medium (Average planning score)															
1.5 Years (18 mo)	1,85,000 (projected hike)	70,000	1,07,000	19,20,000		0 1,50,000	40% White (Safe)	8% ADHD impulsivity creep	Solid	High	High	High	80,000	Medium															
2 Years	1,85,000	80,000	1,05,000		0 1,50,000		20% White	10% ADHD distraction risk	High	High	High	High	1,20,000	High (Family support added)															
3 Years	2,00,000 (new CTC jump)	80,000	1,20,000	41,40,000	0 1,50,000		20% White	15% Risk complacency	High	Very High	Very High	Very High	1,50,000	High (Dependence of Family Care Index)															
4 Years	2,30,000	80,000	1,50,000	61,20,000	0 1,50,000		20% White	10% Stagnant complacency risk	High	High	High	High	1,50,000	High (Full family financial reliance)															
5 Years	2,50,000	1,00,000	1,50,000	87,50,000	0 1,50,000		20% White	20% Overconfidence trap	High	Peak	Peak	Peak	2,00,000																
Equity % Allocation															Debt % Allocation	Gold % Allocation	Cash/Spill % Allocation	Real Estate % Allocation	Real Estate CAGR Projection %	Portfolio Volatility Risk	Asset Liquidity Index (Higher = More Liquid)	Wealth Accumulation Grade	Retirement Capacity %	Strategic Exit Readiness	Passive Retirement Flow (€)	Global/Alternative Asset Exposure %	Asset Concentration Risk %	The Efficiency Index (Higher = Better)	
															20%	20%	10%	20%	2%	2%	Low	BC (Core Holding)	10% None	Highly			2%	Low	30
															20%	20%	10%	20%	4%	4%	Low	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	8%	8%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	12%	12%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	16%	16%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	20%	20%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	24%	24%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	28%	28%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	32%	32%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	36%	36%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	40%	40%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	44%	44%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	48%	48%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	52%	52%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	56%	56%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	60%	60%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	64%	64%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	68%	68%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	72%	72%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	76%	76%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	80%	80%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	84%	84%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	88%	88%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	92%	92%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	96%	96%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	100%	100%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	104%	104%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	108%	108%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	112%	112%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	116%	116%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	120%	120%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	124%	124%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	128%	128%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	132%	132%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	136%	136%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	140%	140%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	144%	144%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	148%	148%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	152%	152%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	156%	156%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	160%	160%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	164%	164%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	168%	168%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	172%	172%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	176%	176%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	180%	180%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	184%	184%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	188%	188%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	192%	192%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	196%	196%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	200%	200%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	204%	204%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	208%	208%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	212%	212%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	216%	216%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	220%	220%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	224%	224%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	228%	228%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	232%	232%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	236%	236%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	240%	240%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	244%	244%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	248%	248%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	252%	252%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	256%	256%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	260%	260%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	264%	264%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	268%	268%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	272%	272%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	276%	276%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	280%	280%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	284%	284%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	288%	288%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	292%	292%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	296%	296%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	300%	300%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	304%	304%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	308%	308%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	312%	312%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	316%	316%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	320%	320%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	324%	324%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	328%	328%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	332%	332%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	336%	336%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	340%	340%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	344%	344%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	348%	348%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	352%	352%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	356%	356%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	360%	360%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	364%	364%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	368%	368%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	372%	372%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	376%	376%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	380%	380%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20%	384%	384%	Medium	BC (Core Holding)	10% None	Highly		2%	Low	30	
															20%	20%	10%	20											