**PORTFOLIO OPTIMIZER**

1. Overview: The portfolio optimizer accepted your inputs and analyzed historical data for the past 20 years. Based on our analysis below is your report around returns, comparative benchmarks and optimized portfolio suggestions. Stocks selected to optimize: {{MSFT, APPL, FB, GS, NVDA}}
2. Returns
   1. Image 1: plot(individual\_stock\_trends)
   2. Image 2: plot(daily\_returns)
   3. Image 3: plot(scatter\_matrix) or Correlation matrix()
   4. Image 4: Plot(monte\_carlo\_simulations)
   5. Image 5: Plot(certain confidence\_interval)
   6. Text: Based on the simulation, above charts, investment amount of {{10,000}} and for an investment horizon of {{3 years}} the expected range of projected cumulative returns for the portfolio is between {{x}} and {{y}} with a {{24%}} chance of occurring
   7. Table?
3. Comparisons
   1. Image 1: Portfolio trends vs. SP500
   2. Image 2: Portfolio expected returns vs. SP500 returns
   3. Text: TBD
4. Optimized portfolio (Tables from Efficient Frontier)
   1. Table 1: Random weights optimized portfolio
   2. Table 2: Suggestion based on risk level
   3. Table 3: Individual stocks returns
   4. Table 4: Portfolio Ratios
5. Summary
   1. Based on your risk profile, investment amount and investment horizon below are our recommendations
      1. Returns with current mix
      2. Comparisons to S&P
      3. Our suggested allocations
      4. Individual stock returns

Thanks for using our portfolio optimizer and have a great day!

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