

1. Sample Investment Data (JSON)

```
JSON
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  {
    "investment_id": "INV-1001",
    "ticker": "AAPL",
    "company_name": "Apple Inc.",
    "asset_class": "Equity",
    "quantity": 50,
    "purchase_price": 145.30,
    "current_market_value": 178.25,
    "currency": "USD",
    "purchase_date": "2023-05-12",
    "investment_advisor": "Sarah Jenkins",
    "brokerage_firm": "Vanguard",
    "account_type": "Roth IRA",
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    "brokerage_firm": "Vanguard",
    "account_type": "Roth IRA",
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    "asset_class": "Equity",
    "quantity": 10,
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    "brokerage_firm": "Fidelity Investments",
    "account_type": "401(k)",
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    "brokerage_firm": "Charles Schwab",
    "account_type": "Individual Brokerage",
    "status": "Active"
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  "brokerage_firm": "Fidelity Investments",
  "account_type": "401(k)",
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  "account_type": "SEP IRA",
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  "brokerage_firm": "Vanguard",
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  "currency": "USD",
  "purchase_date": "2022-08-05",
  "investment_advisor": "Michael Ross",
  "brokerage_firm": "Charles Schwab",
  "account_type": "Individual Brokerage",
  "status": "Sold"
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  "brokerage_firm": "Fidelity Investments",
  "account_type": "401(k)",
  "status": "Active"
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    "purchase_price": 58.00,
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    "investment_advisor": "David Kim",
    "brokerage_firm": "E*TRADE",
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    "brokerage_firm": "Charles Schwab",
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    "status": "Active"
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    "brokerage_firm": "Fidelity Investments",
    "account_type": "401(k)",
    "status": "Active"
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    "brokerage_firm": "E*TRADE",
    "account_type": "Individual Brokerage",
    "status": "Active"
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    "investment_id": "INV-1018",
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    "asset_class": "Equity",
    "quantity": 50,
    "purchase_price": 105.00,
    "current_market_value": 102.50,
    "currency": "USD",
    "purchase_date": "2023-03-01",
    "investment_advisor": "Sarah Jenkins",
    "brokerage_firm": "Vanguard",
    "account_type": "Roth IRA",
    "status": "Active"
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    "investment_id": "INV-1019",
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    "asset_class": "Equity",
    "quantity": 60,
    "purchase_price": 85.00,
    "current_market_value": 115.40,
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    "purchase_date": "2023-02-18",
    "investment_advisor": "Michael Ross",
    "brokerage_firm": "Charles Schwab",
    "account_type": "Individual Brokerage",
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    "status": "Active"
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    "company_name": "Netflix, Inc.",
    "asset_class": "Equity",
    "quantity": 15,
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    "currency": "USD",
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    "investment_advisor": "Elena Rodriguez",
    "brokerage_firm": "Fidelity Investments",
    "account_type": "401(k)",
    "status": "Active"
  }
]
```



## 2. Data Dictionary

(You can copy and paste the content below directly into a Google Doc)

### Investment Portfolio Data Dictionary

**Dataset Overview:** This dataset represents a snapshot of stock investments managed across various brokerage accounts and advisors.

Field Name	Data Type	Description	Example
investment_id	String	A unique alphanumeric identifier assigned to each specific investment lot or transaction record.	"INV-1001"
ticker	String	The standard stock exchange symbol identifying the publicly traded company.	"AAPL"
company_name	String	The full legal name of the entity in which the investment is held.	"Apple Inc."
asset_class	String	The category of the investment (e.g., Equity, Fixed Income, ETF).	"Equity"
quantity	Integer	The total number of shares or units held in this specific investment lot.	50
purchase_price	Float	The price per share paid at the time of the original purchase.	145.30
current_market_value	Float	The current market price per share (simulated for this dataset).	178.25
currency	String	The ISO 4217 code representing the currency in which the asset is traded.	"USD"
purchase_date	Date (ISO 8601)	The date on which the investment was acquired, formatted as YYYY-MM-DD.	"2023-05-12"
investment_advisor	String	The name of the certified financial planner or broker managing this specific investment.	"Sarah Jenkins"
brokerage_firm	String	The financial institution where the investment account is held.	"Vanguard"

account_type	String	The tax or legal structure of the account holding the asset (e.g., Roth IRA, 401(k), Individual).	"Roth IRA"
status	String	The current state of the investment (e.g., "Active" if currently held, "Sold" if liquidated).	"Active"