

Portfolio Summary and Details

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--- Portfolio Summary ---
Total Portfolio Value: $25,612.20
Portfolio Beta (Weighted Average): 1.1607
Portfolio Dividend Yield (Weighted Average): 0.0092

Individual Holdings:
Ticker      LongName      SharesOwned  CurrentPrice  TotalValue  Weight  Beta  Capitalization  Market  DividendYield
AAPL        Apple Inc.    10           197.2000     1972.0000  0.076995  1.184892  Mega-Cap us_market  0.005087
MSFT        Microsoft Corporation  25           479.2769     11981.9225  0.467821  1.116818  Mega-Cap us_market  0.006747
JPM         JPMorgan Chase & Co.  20           274.9900     5499.8000  0.214734  1.041063  Mega-Cap us_market  0.018433
GOOGL       Alphabet Inc.  10           169.1600     1691.6000  0.066047  1.014000  Mega-Cap us_market  0.005770
PINS        Pinterest, Inc.  10           34.2300     342.3000  0.013365  0.907000  Large-Cap us_market  0.000000
CRM         Salesforce, Inc.  10           260.5800     2605.8000  0.101741  1.377000  Mega-Cap us_market  0.006227
PFE         Pfizer Inc.    10           23.7950     237.9500  0.009290  0.491000  Large-Cap us_market  0.070771
AMD         Advanced Micro Devices, Inc.  10           128.0827     1280.8270  0.050008  1.993000  Mega-Cap us_market  0.000000

--- Additional Information ---

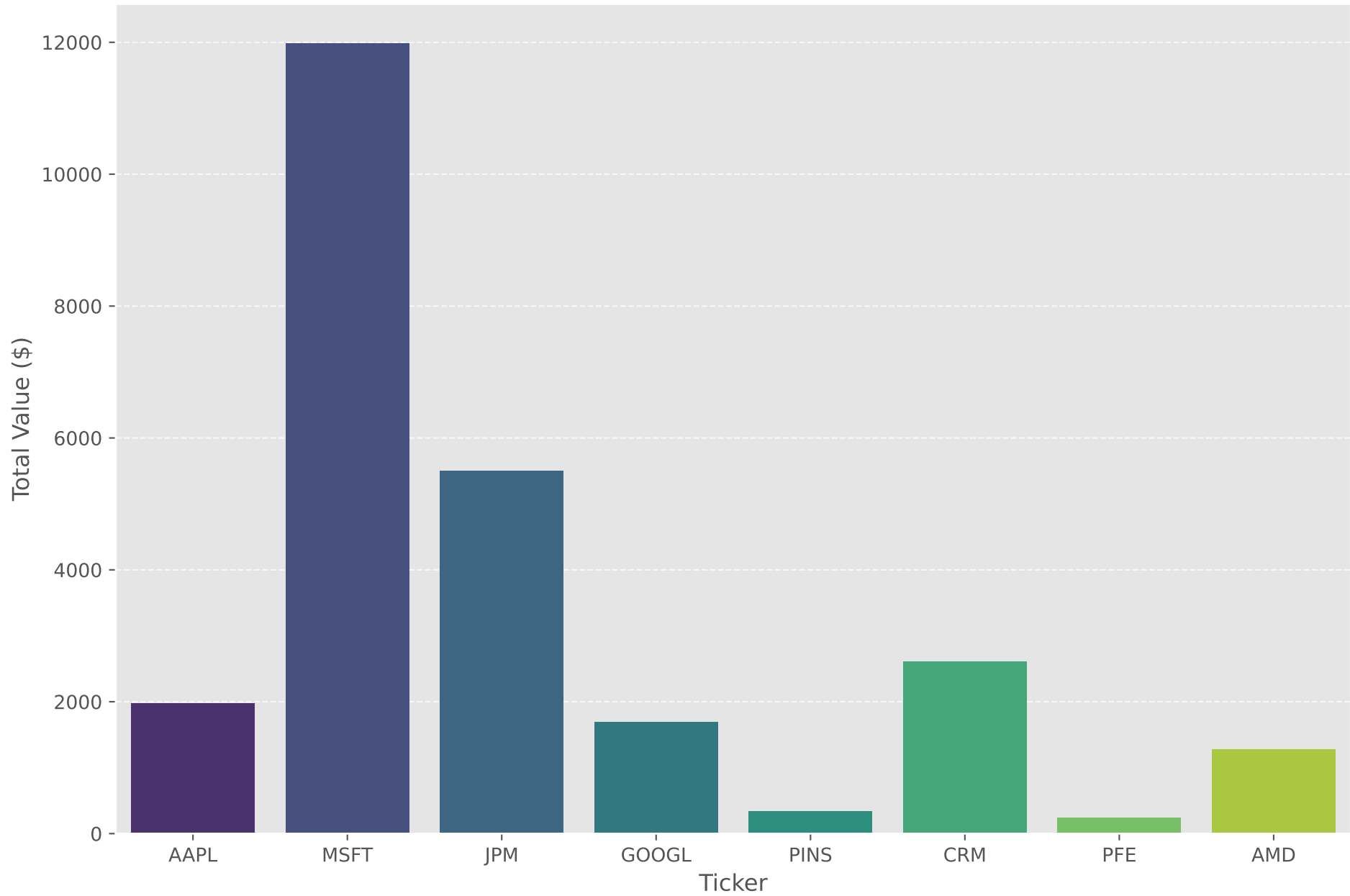
--- Gemini-Generated Portfolio Health Summary ---

    Calling Google Gemini API for summary... (This may take a moment)
    This $25,612.20 portfolio is heavily concentrated in mega-cap US tech stocks (AAPL, MSFT, GOOGL, CRM), lacking significant diversification across sectors and market capitalizations. While Microsoft (MSFT) alone represents nearly half the portfolio, this concentration, while potentially lucrative, increases risk. The portfolio beta of 1.16 suggests slightly higher volatility than the overall market (beta of 1.0). However, the individual betas show some stocks exhibiting higher risk than the portfolio average (AMD, CRM). The overall dividend yield is low (0.0092 or 0.92%), primarily driven by the high weighting of tech stocks that generally offer lower dividend payouts. Pfizer (PFE) is a notable exception, contributing significantly to the yield despite its small portfolio weight. However, relying on PFE for income introduces concentration risk in a different area. In short, the portfolio needs diversification across sectors and market caps to mitigate risk, potentially increasing its income generation through higher-yielding assets, especially considering the low overall yield. While the current concentration in mega-cap tech stocks may offer potential for growth, it's a high-risk strategy.

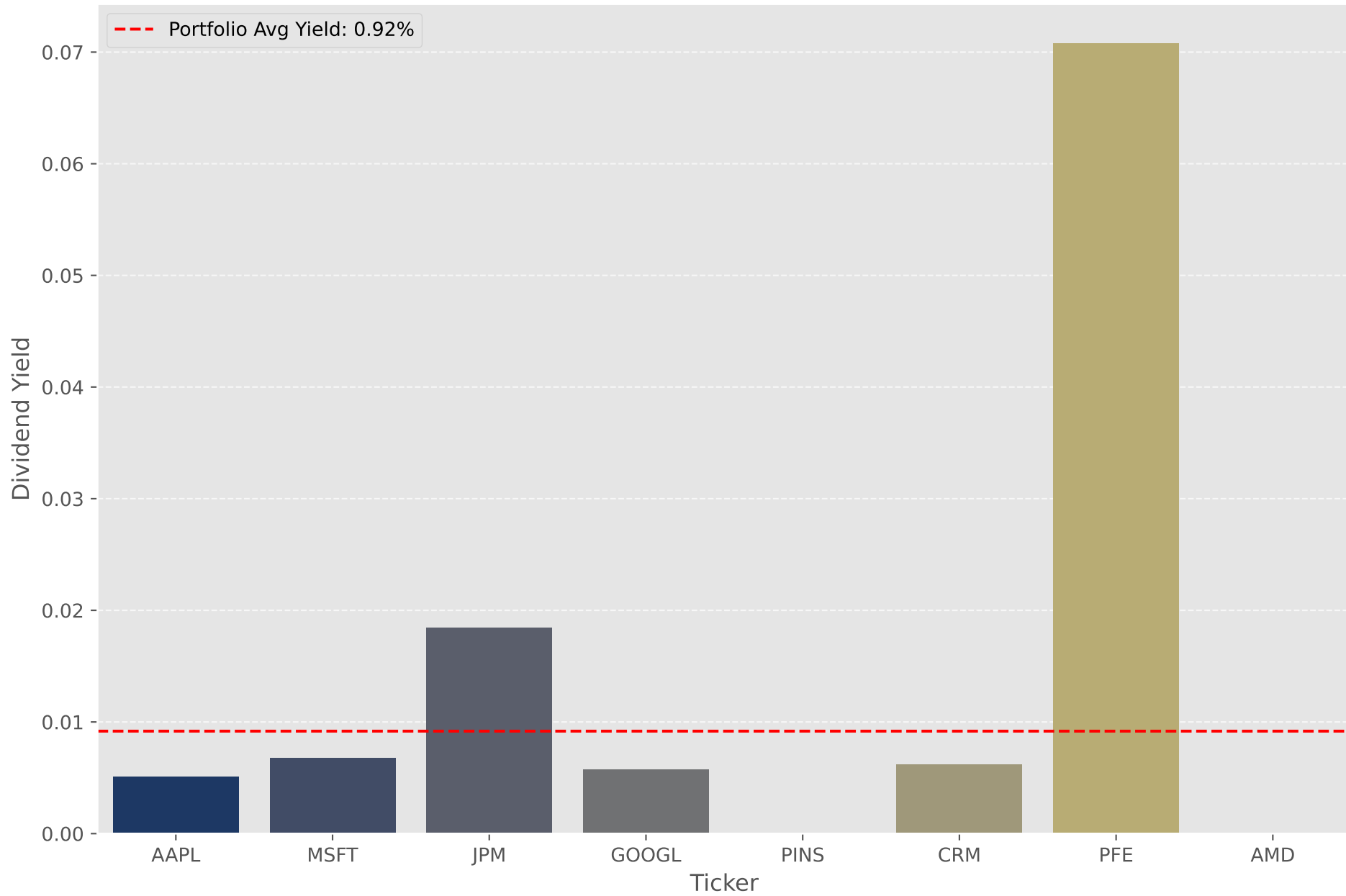
--- End of Gemini Summary ---

Analysis Complete.
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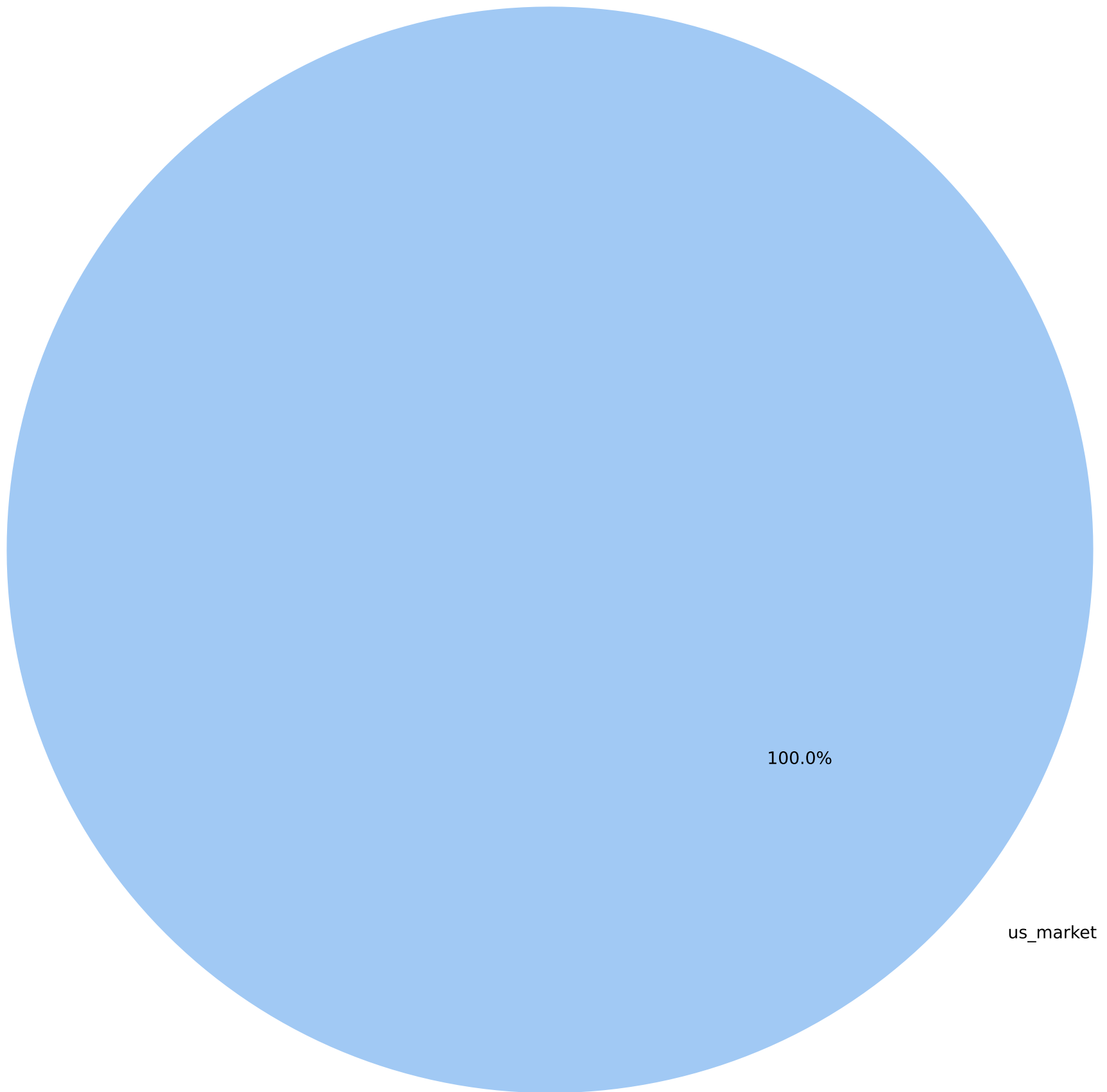
Portfolio Allocation by Value



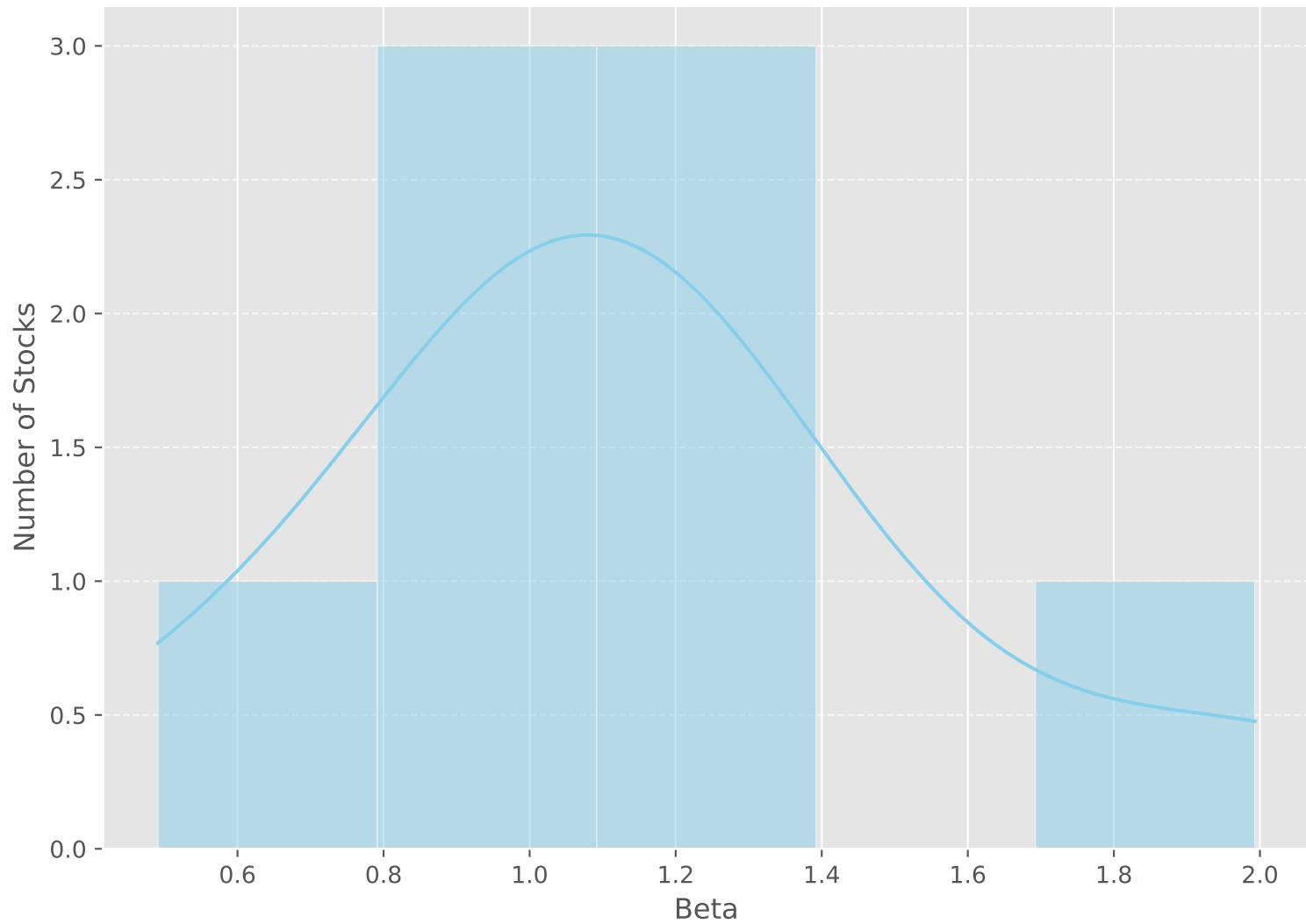
Individual Stock Dividend Yields and Portfolio Average



Portfolio Allocation by Market



Distribution of Stock Betas in Portfolio



10-Year Portfolio Value Projection (10% Annual Growth)

