

▼ **Holdings Summary**

Total Holdings \$112,195.53 | Day Change **+\$1,302.99 (+1.17%)**

Unrealized G/L **+\$12,195.54 (+12.20%)**

Summary Holdings Fundamentals Performance Performance BUS-123 +

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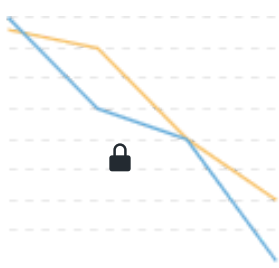
Symbol	Company Name	AC/Share	Last Price	Market Value (\$)	Tot Gain UNRL (%)
BX	Blackstone Inc.	137.12	199.05	14,516.48	+45.16%
CVX	Chevron Corporation	138.56	162.36	11,717.67	+17.18%
FDX	FedEx Corporation	283.04	299.97	10,598.15	+5.98%
JPM	JPMorgan Chase & Co.	212.46	248.55	11,698.67	+16.99%
MSFT	Microsoft Corporation	401.70	417.00	10,380.88	+3.81%
NKE	NIKE, Inc.	80.63	77.40	9,599.41	-4.01%
PKG	Packaging Corporation of America	201.81	246.39	12,209.01	+22.09%
SJM	The J. M. Smucker Company	120.27	113.30	9,420.47	-5.80%
V	Visa Inc.	279.37	309.92	11,093.53	+10.94%
WM	Waste Management, Inc.	204.73	224.41	10,961.27	+9.61%

Risk Analysis

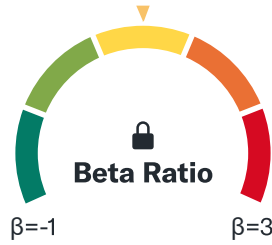
2024 Fall Introduction to Investments Class

S&P 500

View History



Volatility is a formal measure of a stock's risks. The higher the volatility of a stock, the greater its up and down swings.



Beta represents the tendency of a portfolio's returns to respond to swings in the market.

Overvalued	6
Near Fair Value	4
Undervalued	0

Valuation

Fair value analysis provides an intuitive view of a company's fair market value to help you invest with confidence.



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