

## Holdings Summary

Total Holdings \$112,996.77 | Day Change +\$314.44 (+0.28%)

Unrealized G/L +\$12,996.77 (+13.00%)

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Summary Holdings Fundamentals Performance Performance BUS-123 +

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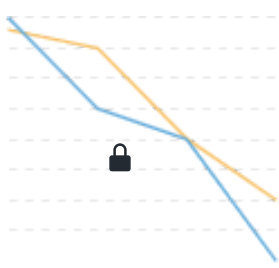
Symbol	Company Name	AC/Share	Last Price	Market Value (\$)	Tot Gain UNRL (%)
<b>BX</b>	Blackstone Inc.	137.12	191.30	13,951.28	+39.51%
<b>CVX</b>	Chevron Corporation	138.56	161.95	11,687.72	+16.88%
<b>FDX</b>	FedEx Corporation	283.04	302.74	10,696.02	+6.96%
<b>JPM</b>	JPMorgan Chase & Co.	212.46	250.12	11,772.57	+17.73%
<b>MSFT</b>	Microsoft Corporation	401.70	423.46	10,541.70	+5.42%
<b>NKE</b>	NIKE, Inc.	80.63	78.82	9,775.52	-2.24%
<b>PKG</b>	Packaging Corporation of America	201.81	248.76	12,326.69	+23.27%
<b>SJM</b>	The J. M. Smucker Company	120.27	118.01	9,812.09	-1.88%
<b>V</b>	Visa Inc.	279.37	315.14	11,280.20	+12.80%
<b>WM</b>	Waste Management, Inc.	204.73	228.34	11,152.98	+11.53%

Risk Analysis

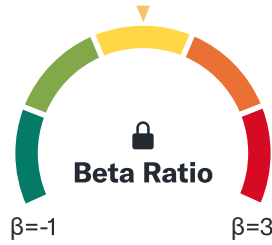
2024 Fall Introduction to Investments Class

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	7
Near Fair Value	3
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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