

▼ **Holdings Summary**

Total Holdings **\$110,929.98** | Day Change **-\$190.59 (-0.17%)**

Unrealized G/L **+\$10,929.98 (+10.93%)**

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	187.00	13,637.69	+36.38%		
CVX	Chevron Corporation	138.56	155.24	11,203.81	+12.04%		
FDX	FedEx Corporation	283.04	280.68	9,916.62	-0.83%		
JPM	JPMorgan Chase & Co.	212.46	247.36	11,642.66	+16.43%		
MSFT	Microsoft Corporation	401.70	443.57	11,042.32	+10.42%		
NKE	NIKE, Inc.	80.63	78.89	9,784.20	-2.16%		
PKG	Packaging Corporation of America	201.81	242.86	12,034.09	+20.34%		
SJM	The J. M. Smucker Company	120.27	116.46	9,683.21	-3.17%		
V	Visa Inc.	279.37	311.01	11,132.55	+11.33%		
WM	Waste Management, Inc.	204.73	222.19	10,852.83	+8.53%		

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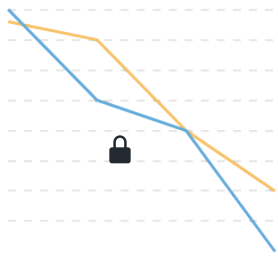
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Risk Analysis

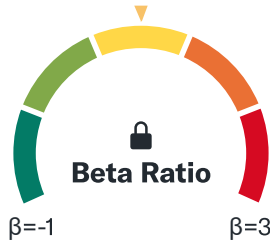
2024 Fall Introduction to Investments Class

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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