

Holdings Summary

\$104,207.72

Day Change +\$517.69 (+0.50%)

Unrealized G/L +\$4,134.83 (+4.13%)



Summary Holdings Fundamentals Performance  Performance BUS-123 +

Add tickers

Symbol	Company Name	Last Price	Change (%)	Shares	AC/Share	Tot Gain UNRL (\$)	Market Value (\$)
AAPL	Apple Inc.	262.82	+1.25%	44.021835	227.16	+1,569.82	11,569.82
CAT	Caterpillar Inc.	522.73	+0.43%	23.132084	432.30	+2,091.83	12,091.83
COST	Costco Wholesale Corporation	932.14	-1.05%	10.620447	941.58	-100.26	9,899.74
KO	The Coca-Cola Company	69.71	-0.33%	145.074714	68.93	+113.16	10, 
LMT	Lockheed Martin Corporation	485.41	-0.54%	22.4982	447.72	+847.96	10,920.85
MSFT	Microsoft Corporation	523.61	+0.59%	19.83104	504.26	+383.73	10,383.73
NVDA	NVIDIA Corporation	186.26	+2.25%	55.61426	179.81	+358.71	10,358.71
PFE	Pfizer Inc.	24.76	+0.36%	397.772474	25.14	-151.15	9,848.85
SHEL	Shell plc	75.84	+0.16%	135.464644	73.82	+273.64	10,273.64
T	AT&T Inc.	25.14	+2.11%	347.947112	28.74	-1,252.61	8,747.39

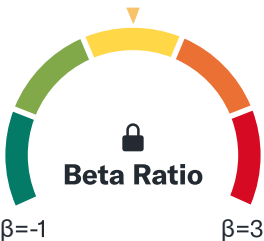
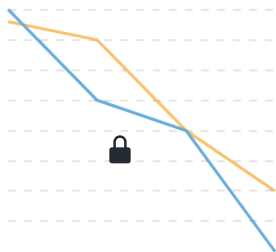


Risk Analysis

2025 Fall Introduction to Investments

S&P 500

 View History



Overvalued	6
Near Fair Value	3
Undervalued	1