Balance

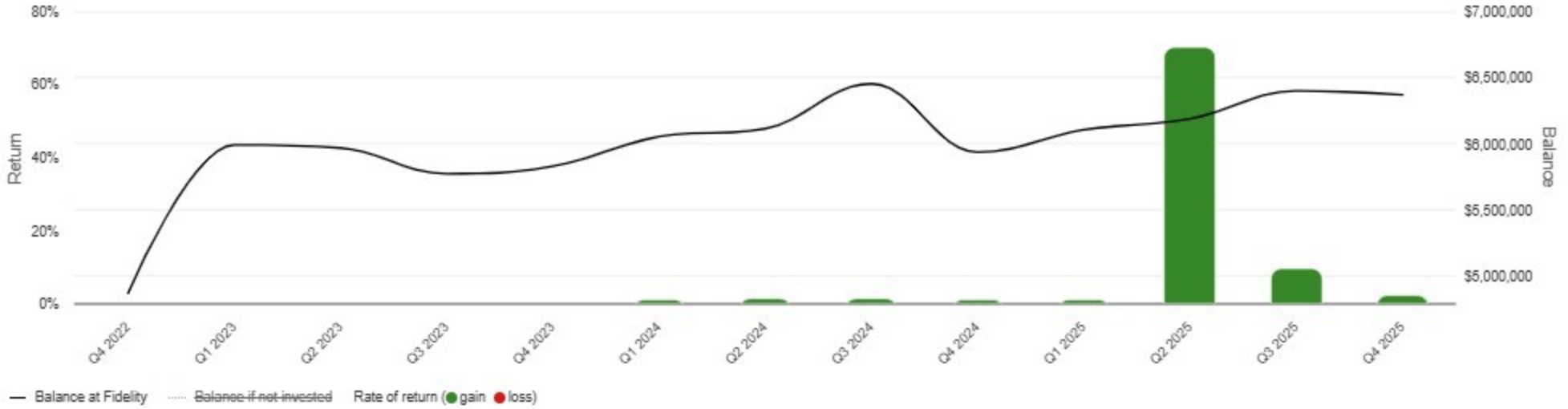
$7,270,421.77

+$1,582,988.36 (+32.63%)

Return

+102.40%

Invested	Cash	Investment income	Net deposits and withdrawals
$6,370,370.57	$884.52	$827,734.48	+$282,659.35



Total returns

See all →

Accounts not included 11 of 13

Dec-21-2023 to Dec-24-2025

View your investment growth

Time-weighted rate of return (pre-tax)

Cumulative ○ Annualized

Your return	+102.40%
S&P 500® Index	+88.22%
Dow Jones U.S. Total Stock Market Index	+85.17%
MSCI ACWI ex USA (Net MA Tax)	+62.30%
Bloomberg U.S. Aggregate Bond Index	+13.89%
Bloomberg Municipal Bond Index	+11.67%

Investment income

See all →

Accounts not included 7 of 13

Dec-01-2022 to Dec-24-2025



Investment income	$827,734.48

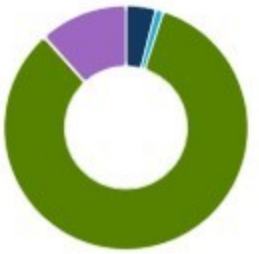
Asset allocation

See all →

Accounts not included 4 of 13

As of Dec-26-2025

Percentages ○ Dollars



Domestic Stock	4.0%
Foreign Stock	1.0%
Bonds	83.3%
Short Term	> -0.1%
Other	0.2%
Unknown	11.6%