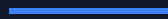


PULSENEURON



Portfolio Report

Full Portfolio

8 April 2026

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Executive Summary

Net Worth \$1,196,324	Portfolio Value \$409,468
Monthly Surplus \$25,864 Positive cash flow	Savings Rate 68.9%
Wellness Score 85 / 100 Grade: A	Debt-to-Asset Ratio 0.3%

Members: **7** Holdings: **56** Currency: **USD**

Net Worth Statement

ASSETS

Portfolio Value	\$523,226
Cash Accounts	\$45,999
Physical Assets	\$1,147,500
Total Assets	\$1,716,724

LIABILITIES

Chase Sapphire Credit Card	\$4,200
Federal Student Loan	\$24,500
Jame Car Loan - F-150	\$28,500
Sarah Car Loan - RAV4	\$18,200
Home Mortgage	\$445,000
Total Liabilities	\$520,400

NET WORTH**\$1,196,324**Debt-to-Asset Ratio: **0.3%**

Portfolio Holdings

James Mitchell

Ticker	Name	Shares	Cost	Price	Value	P/L	P/L%	Days	Wt%
BTC/USD	Bitcoin US Dollar	0.50	\$15,100	\$70,211	\$35,105	\$20,005	132.5%	1,010	28.8%
META	Meta Platforms Inc Class A	35.00	\$3,440	\$574.91	\$20,122	\$16,682	484.9%	1,240	16.5%
VOO	Vanguard S&P 500 ETF	20.00	\$7,510	\$606.04	\$12,121	\$4,611	61.4%	1,833	10.0%
MSFT	Microsoft Corp.	30.00	\$6,970	\$372.27	\$11,168	\$4,198	60.2%	1,899	9.2%
AMD	Advanced Micro Devices, Inc.	40.00	\$4,090	\$221.43	\$8,857	\$4,767	116.6%	1,064	7.3%
NVDA	NVIDIA Corporation	45.00	\$9,701	\$178.10	\$8,014	-\$1,687	-17.4%	1,883	6.6%
GOOGL	Alphabet Inc.	25.00	\$2,635	\$305.45	\$7,636	\$5,001	189.8%	1,850	6.3%
ETH/USD	Ethereum US Dollar	3.00	\$5,610	\$2,156	\$6,468	\$858.12	15.3%	1,010	5.3%
TSLA	Tesla, Inc.	15.00	\$9,305	\$346.56	\$5,198	-\$4,107	-44.1%	1,758	4.3%
AMZN	Amazon.com, Inc.	20.00	\$2,910	\$213.78	\$4,276	\$1,366	46.9%	1,499	3.5%
CRM	Salesforce Inc	15.00	\$3,985	\$182.99	\$2,745	-\$1,240	-31.1%	783	2.3%

Total Cost: **\$71,256** Market Value: **\$121,711** Unrealised P/L: **\$50,455 (70.8%)**
 Realised P/L: **\$9,676** Total Fees: **\$119.40**

Portfolio Holdings

Sarah Mitchell

Ticker	Name	Shares	Cost	Price	Value	P/L	P/L%	Days	Wt%
VOO	Vanguard S&P 500 ETF	25.00	\$9,010	\$606.04	\$15,151	\$6,141	68.2%	1,888	23.2%
JNJ	Johnson & Johnson	40.00	\$6,610	\$238.44	\$9,538	\$2,928	44.3%	1,878	14.6%
COST	Costco Wholesale Corporation	8.00	\$4,290	\$1,013	\$8,106	\$3,816	88.9%	1,549	12.4%
V	Visa Inc. Class A	20.00	\$4,410	\$302.54	\$6,051	\$1,641	37.2%	1,825	9.3%
VYM	Vanguard High Dividend Yield ETF	40.00	\$4,210	\$149.09	\$5,964	\$1,754	41.7%	1,772	9.1%
MSFT	Microsoft Corp.	15.00	\$3,850	\$372.27	\$5,584	\$1,734	45.0%	1,363	8.5%
O	Realty Income Corporation	80.00	\$5,450	\$62.24	\$4,979	-\$470.75	-8.6%	1,801	7.6%
PG	Procter & Gamble Co	30.00	\$3,970	\$141.28	\$4,238	\$268.45	6.8%	1,864	6.5%
AMT	American Tower Corporation	15.00	\$3,790	\$174.12	\$2,612	-\$1,178	-31.1%	1,468	4.0%
BND	Vanguard Total Bond Market Index Fund	30.00	\$2,556	\$73.58	\$2,207	-\$348.57	-13.6%	1,728	3.4%
NVO	Novo Nordisk A/S Sponsored ADR	25.00	\$3,885	\$36.92	\$923.00	-\$2,962	-76.2%	1,028	1.4%

Total Cost: **\$52,030** Market Value: **\$65,353** Unrealised P/L: **\$13,322 (25.6%)**
 Realised P/L: **-\$243.93** Total Fees: **\$119.40**

Portfolio Holdings

Emily Mitchell

Ticker	Name	Shares	Cost	Price	Value	P/L	P/L%	Days	Wt%
VOO	Vanguard S&P 500 ETF	5.00	\$1,835	\$606.04	\$3,030	\$1,195	65.1%	1,402	33.6%
QQQ	Invesco QQQ Trust	5.00	\$1,460	\$588.72	\$2,944	\$1,484	101.6%	1,402	32.6%
MSFT	Microsoft Corp.	5.00	\$1,210	\$372.27	\$1,861	\$651.40	53.8%	1,184	20.6%
NVDA	NVIDIA Corporation	5.00	\$2,735	\$178.10	\$890.48	-\$1,844	-67.4%	814	9.9%
NFLX	Netflix, Inc.	3.00	\$1,225	\$98.85	\$296.55	-\$928.40	-75.8%	1,042	3.3%

Total Cost: **\$8,465** Market Value: **\$9,022** Unrealised P/L: **\$557.43 (6.6%)**

Portfolio Holdings

Liam Mitchell

Ticker	Name	Shares	Cost	Price	Value	P/L	P/L%	Days	Wt%
BTC/ USD	Bitcoin US Dollar	0.05	\$2,210	\$70,211	\$3,511	\$1,301	58.8%	824	33.5%
VOO	Vanguard S&P 500 ETF	5.00	\$1,910	\$606.04	\$3,030	\$1,120	58.7%	1,311	28.9%
AMD	Advanced Micro Devices, Inc.	10.00	\$1,160	\$221.43	\$2,214	\$1,054	90.9%	1,028	21.1%
TSLA	Tesla, Inc.	5.00	\$959.95	\$346.56	\$1,733	\$772.85	80.5%	1,162	16.5%

Total Cost: **\$6,240** Market Value: **\$10,488** Unrealised P/L: **\$4,248 (68.1%)**

Portfolio Holdings

Olivia Mitchell

Ticker	Name	Shares	Cost	Price	Value	P/L	P/L%	Days	Wt%
VOO	Vanguard S&P 500 ETF	3.00	\$1,195	\$606.04	\$1,818	\$623.17	52.2%	1,129	50.7%
QQQ	Invesco QQQ Trust	3.00	\$939.95	\$588.72	\$1,766	\$826.21	87.9%	1,129	49.3%

Total Cost: **\$2,135** Market Value: **\$3,584** Unrealised P/L: **\$1,449 (67.9%)**

Portfolio Holdings

Marcus Chen

Ticker	Name	Shares	Cost	Price	Value	P/L	P/L%	Days	Wt%
BTC/USD	Bitcoin US Dollar	0.75	\$19,575	\$70,211	\$52,658	\$33,083	169.0%	950	36.2%
META	Meta Platforms Inc Class A	40.00	\$3,610	\$574.91	\$22,996	\$19,386	537.0%	1,680	15.8%
PLTR	Palantir Technologies Inc.	100.00	\$754.98	\$150.06	\$15,006	\$14,251	1,887.6%	1,178	10.3%
TSM	Taiwan Semiconductor Manufacturing Co. Ltd. ADR	40.00	\$4,730	\$345.04	\$13,802	\$9,072	191.8%	1,772	9.5%
GOOGL	Alphabet Inc.	30.00	\$3,370	\$305.45	\$9,164	\$5,794	171.9%	1,794	6.3%
QQQ	Invesco QQQ Trust	15.00	\$4,885	\$588.72	\$8,831	\$3,946	80.8%	1,073	6.1%
ASML	ASML Holding N.V. New York Registry Shares	5.00	\$3,410	\$1,306	\$6,528	\$3,118	91.4%	1,728	4.5%
SHOP	Shopify Inc.	50.00	\$1,610	\$117.05	\$5,853	\$4,243	263.5%	1,393	4.0%
NVDA	NVIDIA Corporation	30.00	\$4,510	\$178.10	\$5,343	\$832.90	18.5%	1,819	3.7%
MELI	MercadoLibre, Inc.	3.00	\$2,770	\$1,742	\$5,225	\$2,456	88.6%	1,254	3.6%

Total Cost: **\$49,225** Market Value: **\$145,405** Unrealised P/L: **\$96,181 (195.4%)**
 Realised P/L: **-\$2,305** Total Fees: **\$119.40**

Portfolio Holdings

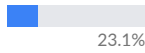

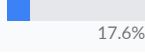
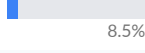
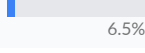
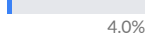
Priya Sharma

Ticker	Name	Shares	Cost	Price	Value	P/L	P/L%	Days	Wt%
JPM	JPMorgan Chase & Co.	30.00	\$4,570	\$297.42	\$8,923	\$4,353	95.2%	1,731	16.6%
TSM	Taiwan Semiconductor Manufacturing Co. Ltd. ADR	20.00	\$1,930	\$345.04	\$6,901	\$4,971	257.6%	967	12.8%
VOO	Vanguard S&P 500 ETF	10.00	\$4,110	\$606.04	\$6,060	\$1,950	47.5%	1,454	11.2%
COST	Costco Wholesale Corporation	5.00	\$2,560	\$1,013	\$5,066	\$2,506	97.9%	1,527	9.4%
V	Visa Inc. Class A	15.00	\$3,535	\$302.54	\$4,538	\$1,003	28.4%	1,728	8.4%
VYM	Vanguard High Dividend Yield ETF	30.00	\$3,220	\$149.09	\$4,473	\$1,253	38.9%	1,650	8.3%
O	Realty Income Corporation	60.00	\$4,270	\$62.24	\$3,734	-\$535.55	-12.5%	1,680	6.9%
JNJ	Johnson & Johnson	15.00	\$2,586	\$238.44	\$3,577	\$990.63	38.3%	1,710	6.6%
VXUS	Vanguard Total International Stock Index Fund	40.00	\$2,010	\$78.01	\$3,120	\$1,110	55.2%	1,315	5.8%
PG	Procter & Gamble Co	20.00	\$2,850	\$141.28	\$2,826	-\$24.35	-0.9%	1,696	5.2%
BND	Vanguard Total Bond Market Index Fund	30.00	\$2,155	\$73.58	\$2,207	\$52.45	2.4%	797	4.1%
AMT	American Tower Corporation	10.00	\$2,660	\$174.12	\$1,741	-\$918.75	-34.5%	1,407	3.2%
NVO	Novo Nordisk A/S Sponsored ADR	20.00	\$2,910	\$36.92	\$738.40	-\$2,172	-74.6%	1,134	1.4%


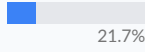
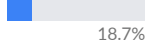
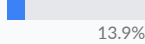
Total Cost: **\$39,365** Market Value: **\$53,905** Unrealised P/L: **\$14,539 (36.9%)**
 Realised P/L: **-\$153.93** Total Fees: **\$139.30**

Allocation Analysis

By Group

Category	Value	Actual %	Target %	Drift %	Holdings
Core	\$120,589	 23.1%	0.0%	23.1%	8
Cash	\$113,758	 21.7%	0.0%	0.0%	0
Crypto	\$97,742	 18.7%	0.0%	18.7%	2
Growth	\$91,951	 17.6%	0.0%	17.6%	7
International	\$44,554	 8.5%	0.0%	8.5%	5
Income	\$33,774	 6.5%	0.0%	6.5%	5
Speculative	\$20,859	 4.0%	0.0%	4.0%	2

By Asset Class

Category	Value	Actual %	Target %	Drift %	Holdings
Equity	\$239,003	 45.7%	0.0%	45.7%	22
Cash	\$113,758	 21.7%	0.0%	0.0%	0
Crypto	\$97,742	 18.7%	0.0%	18.7%	2
Etf	\$72,723	 13.9%	0.0%	13.9%	5

Income & Dividends

Total Dividends

\$0.00

Portfolio Yield

0.0%

Total Interest

\$0.00

Projected Annual

\$0.00

Household Cash Flow

Monthly Income	\$37,516
Monthly Expenses	\$6,555
Monthly Subscriptions	\$292.00
Monthly Debt Payments	\$4,805
Total Outgoings	\$11,652

Monthly Surplus

\$25,864

Savings Rate

68.9%

Expense Breakdown by Category

Category	Monthly Amount	% of Total	Type
Other	\$2,220	32.4%	Discretionary
Groceries	\$1,210	17.7%	Essential
Healthcare	\$769.00	11.2%	Essential
Utilities	\$620.00	9.1%	Essential
DiningOut	\$450.00	6.6%	Discretionary
Insurance	\$425.00	6.2%	Essential
Entertainment	\$409.00	6.0%	Discretionary
Transport	\$400.00	5.8%	Essential
Clothing	\$250.00	3.7%	Discretionary
Education	\$94.00	1.4%	Discretionary

Debt Schedule

Total Debt: **\$520,400** Avg Rate: **3.6%** Min Payments: **\$3,754**

Name	Type	Balance	Rate %	Payment	Months	Interest Cost	Payoff Date
Chase Sapphire Credit Card	CreditCard	\$4,200	22.0%	\$500.00	10	\$403.20	Feb 2027
Federal Student Loan	StudentLoan	\$24,500	5.5%	\$320.00	95	\$5,744	Mar 2034
Jame Car Loan - F-150	CarLoan	\$28,500	4.9%	\$615.00	52	\$3,158	Aug 2030
Sarah Car Loan - RAV4	CarLoan	\$18,200	3.9%	\$520.00	38	\$1,153	Jun 2029
Home Mortgage	Mortgage	\$445,000	3.3%	\$2,850	204	\$134,243	Apr 2043

Total Balance: \$520,400 **Total Interest: \$144,701**

Projected Debt Freedom: **April 2043**

Physical Assets

Name	Type	Purchase Price	Current Value	Gain / Loss	Linked Debts
Rental Condo - 18B Oak Ave	InvestmentProperty	\$285.00	\$340,500	\$340,215	-
Engagment Ring & Jewelry Set	Jewellery	\$12,000	\$15,500	\$3,500	-
Family Home - 42 Maple Drive	PrimaryResidence	\$580,000	\$725,000	\$145,000	\$445,000
2021 Toyota RAV4 Hybrid	Vehicle	\$38,500	\$28,500	-\$10,000	\$18,200
2022 Ford F-150 Lightning	Vehicle	\$55,000	\$38,000	-\$17,000	\$28,500

Total Asset Value: **\$1,147,500**

Subscriptions

Monthly Total: **\$292.00** Annual Total: **\$3,504** Active: **10**

Name	Provider	Monthly	Annual	Billing
YMCA Family	YMCA	\$89.00	\$1,068	Monthly
Adobe Creative Cloud	Adobe	\$55.00	\$660.00	Monthly
WJS Digital	Dow Jones	\$39.00	\$468.00	Monthly
Netflix Premium	Netflix	\$23.00	\$276.00	Monthly
YouTube Premium Family	Google	\$23.00	\$276.00	Monthly
Spotify Family	Spotify	\$17.00	\$204.00	Monthly
Disney + Bundle	Disney	\$14.00	\$168.00	Monthly
Amazon Prime	Amazon	\$12.00	\$144.00	Monthly
Costco Executive	Costco	\$10.00	\$120.00	Monthly
iCloud + 2TB Family	Apple	\$10.00	\$120.00	Monthly

By Category

Category	Monthly	% of Total
Education	\$94.00	32.2%
Healthcare	\$89.00	30.5%
Entertainment	\$89.00	30.5%
Groceries	\$10.00	3.4%
Utilities	\$10.00	3.4%

Financial Goals

Name	Type	Target	Current	Progress	Status	Monthly Req	Projected
Pay Off Credit Card	DebtFree	\$4,200	\$523,226	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100.0%	On Track	\$0.00	Apr 2026
Family Emergency Fund	Emergency	\$60,000	\$523,226	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100.0%	On Track	\$0.00	Apr 2026
Family Vacation - Japan	Vacation	\$15,000	\$80,078	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100.0%	On Track	\$0.00	Apr 2026
House Down Payment	HouseDeposit	\$120,000	\$159,376	<div style="width: 100%;"><div style="width: 100%;"></div></div> 100.0%	On Track	\$0.00	Apr 2026
Rental Property #2	Investment	\$100,000	\$80,078	<div style="width: 80.1%;"><div style="width: 80.1%;"></div></div> 80.1%	On Track	\$1,527	Feb 2027
Graduate School Fund	Education	\$85,000	\$15,307	<div style="width: 18.0%;"><div style="width: 18.0%;"></div></div> 18.0%	Behind	\$2,392	Dec 2037
Early Retirement a 55	Retirement	\$2,000,000	\$188,131	<div style="width: 9.4%;"><div style="width: 9.4%;"></div></div> 9.4%	Behind	\$5,079	Oct 2101

Cash Accounts

Total Balance: **\$45,999** Accounts: **6**

Emily Mitchell

Account	Institution	Currency	Balance	In USD	Rate %
College Savings Fund	Vanguard	USD	\$2,720	\$2,720	-
					Subtotal: \$2,720

James Mitchell

Account	Institution	Currency	Balance	In USD	Rate %
Fidelity Cash Reserve	Fidelity	USD	\$13,159	\$13,159	5.0%
Ally Savings Account	Ally Bank	USD	\$8,501	\$8,501	4.3%
					Subtotal: \$21,660

Marcus Chen

Account	Institution	Currency	Balance	In USD	Rate %
IBKR Cash Account	Interactive Brokers	USD	\$6,989	\$6,989	4.8%
					Subtotal: \$6,989

Priya Sharma

Account	Institution	Currency	Balance	In USD	Rate %
Schwab Cash Account	Charles Schwab	USD	\$10,978	\$10,978	4.5%
					Subtotal: \$10,978

Sarah Mitchell

Account	Institution	Currency	Balance	In USD	Rate %
Marcus High-Yield Savings	Goldman Sachs	USD	\$3,652	\$3,652	4.4%
					Subtotal: \$3,652

Cash Flow Forecast

08 Apr 2026 – 07 July 2026

Total Inflows \$112,548	Total Outflows \$34,956
Net Cash Flow \$77,592	Projected Balance \$77,592

Monthly Income vs Expenses

Month	Income	Expenses	Subs	Debt	Total Out	Gap
2025-05	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2025-06	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2025-07	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2025-08	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2025-09	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2025-10	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2025-11	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2025-12	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2026-01	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2026-02	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2026-03	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864
2026-04	\$37,516	\$6,555	\$292.00	\$4,805	\$11,652	\$25,864

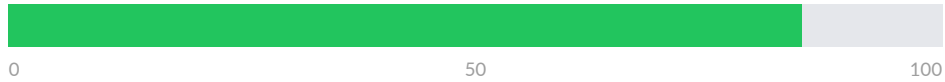
Savings Rate Trend

Month	Income	Outgoings	Surplus	Savings Rate
2025-05	\$37,516	\$11,652	\$25,864	68.9%
2025-06	\$37,516	\$11,652	\$25,864	68.9%
2025-07	\$37,516	\$11,652	\$25,864	68.9%
2025-08	\$37,516	\$11,652	\$25,864	68.9%
2025-09	\$37,516	\$11,652	\$25,864	68.9%
2025-10	\$37,516	\$11,652	\$25,864	68.9%
2025-11	\$37,516	\$11,652	\$25,864	68.9%
2025-12	\$37,516	\$11,652	\$25,864	68.9%
2026-01	\$37,516	\$11,652	\$25,864	68.9%
2026-02	\$37,516	\$11,652	\$25,864	68.9%
2026-03	\$37,516	\$11,652	\$25,864	68.9%
2026-04	\$37,516	\$11,652	\$25,864	68.9%

Financial Wellness

85

out of 100 – Grade: A



Wellness Dimensions

Dimension	Score	Weight	Description
Savings Rate	100 / 100	25%	Strong savings rate – well above typical benchmarks.
Debt Health	55 / 100	25%	Moderate debt load relative to total assets.
Cash Flow	100 / 100	20%	Monthly surplus of 25,864 after all outgoings.
Income Security	100 / 100	15%	Income from 4 distinct source types – well diversified.
Net Worth	75 / 100	15%	Positive net worth – assets exceed liabilities.

Observations

- **Strong savings rate**
 Your savings rate of 68.9% is above the commonly cited 20% benchmark.
- **10 active subscription(s)**
 Total annual subscription cost: 3,504 USD.
- **Cash reserves cover 3.9 months of expenses**
 This falls within the commonly referenced 3-6 month range.
- **1 high-interest debt(s) detected**
 Debts at 15%+ interest: Chase Sapphire Credit Card (22.0%).

Tax Summary

Realised Gains	\$10,891
Realised Losses	-\$3,918
Net Realised P/L	\$6,974
Short-Term P/L	\$4,130
Long-Term P/L	\$2,843
Harvest Candidates	13
Wash Sale Warnings	0

Closed Positions

Ticker	Buy Date	Sell Date	Days	Term	Qty	Cost	Proceeds	P/L
JNJ	02/08/21	10/01/24	891	Long	10.00	\$1,724	\$1,570	-\$153.93
PLTR	16/01/23	01/11/23	289	Short	100.00	\$754.98	\$1,970	\$1,215
NVDA	10/02/21	01/08/23	902	Long	15.00	\$3,679	\$6,920	\$3,241
BND	15/07/21	01/03/23	594	Long	20.00	\$1,704	\$1,460	-\$243.93
META	01/09/21	10/02/22	162	Short	25.00	\$9,010	\$5,490	-\$3,520
TSLA	15/06/21	10/01/22	209	Short	15.00	\$9,305	\$15,740	\$6,435

Transaction Log

James Mitchell

14 transactions | 12 buys | 2 sells | Total invested: \$84,240 | Total brokerage: \$119.40

Date	Side	Ticker	Instrument	Qty	Price	Fee	Total
15 Feb 24	Buy	CRM	Salesforce Inc	15.00	\$265.00	\$9.95	\$3,985
01 Aug 23	Sell	NVDA	NVIDIA Corporation	15.00	\$462.00	\$9.95	\$6,940
03 July 23	Buy	BTC/USD	Bitcoin US Dollar	0.50	\$30,200	\$0.00	\$15,100
03 July 23	Buy	ETH/USD	Ethereum US Dollar	3.00	\$1,870	\$0.00	\$5,610
10 May 23	Buy	AMD	Advanced Micro Devices, Inc.	40.00	\$102.00	\$9.95	\$4,090
20 Jan 23	Buy	NVDA	NVIDIA Corporation	20.00	\$178.00	\$9.95	\$3,570
15 Nov 22	Buy	META	Meta Platforms Inc Class A	35.00	\$98.00	\$9.95	\$3,440
01 Mar 22	Buy	AMZN	Amazon.com, Inc.	20.00	\$145.00	\$9.95	\$2,910
10 Jan 22	Sell	TSLA	Tesla, Inc.	15.00	\$1,050	\$9.95	\$15,760
15 June 21	Buy	TSLA	Tesla, Inc.	30.00	\$620.00	\$9.95	\$18,610
01 Apr 21	Buy	VOO	Vanguard S&P 500 ETF	20.00	\$375.00	\$9.95	\$7,510
15 Mar 21	Buy	GOOGL	Alphabet Inc.	25.00	\$105.00	\$9.95	\$2,635
10 Feb 21	Buy	NVDA	NVIDIA Corporation	40.00	\$245.00	\$9.95	\$9,810
25 Jan 21	Buy	MSFT	Microsoft Corp.	30.00	\$232.00	\$9.95	\$6,970

Transaction Log

Sarah Mitchell

12 transactions | 11 buys | 1 sells | Total invested: \$53,734 | Total brokerage: \$119.40

Date	Side	Ticker	Instrument	Qty	Price	Fee	Total
15 June 23	Buy	NVO	Novo Nordisk A/S Sponsored ADR	25.00	\$155.00	\$9.95	\$3,885
01 Mar 23	Sell	BND	Vanguard Total Bond Market Index Fund	20.00	\$73.50	\$9.95	\$1,480
15 July 22	Buy	MSFT	Microsoft Corp.	15.00	\$256.00	\$9.95	\$3,850
01 Apr 22	Buy	AMT	American Tower Corporation	15.00	\$252.00	\$9.95	\$3,790
10 Jan 22	Buy	COST	Costco Wholesale Corporation	8.00	\$535.00	\$9.95	\$4,290
15 July 21	Buy	BND	Vanguard Total Bond Market Index Fund	50.00	\$85.00	\$9.95	\$4,260
01 June 21	Buy	VYM	Vanguard High Dividend Yield ETF	40.00	\$105.00	\$9.95	\$4,210
03 May 21	Buy	O	Realty Income Corporation	80.00	\$68.00	\$9.95	\$5,450
09 Apr 21	Buy	V	Visa Inc. Class A	20.00	\$220.00	\$9.95	\$4,410
01 Mar 21	Buy	PG	Procter & Gamble Co	30.00	\$132.00	\$9.95	\$3,970
15 Feb 21	Buy	JNJ	Johnson & Johnson	40.00	\$165.00	\$9.95	\$6,610
05 Feb 21	Buy	VOO	Vanguard S&P 500 ETF	25.00	\$360.00	\$9.95	\$9,010

Transaction Log

Emily Mitchell

5 transactions | 5 buys | 0 sells | Total invested: \$8,465 | Total brokerage: \$49.75

Date	Side	Ticker	Instrument	Qty	Price	Fee	Total
15 Jan 24	Buy	NVDA	NVIDIA Corporation	5.00	\$545.00	\$9.95	\$2,735
01 June 23	Buy	NFLX	Netflix, Inc.	3.00	\$405.00	\$9.95	\$1,225
10 Jan 23	Buy	MSFT	Microsoft Corp.	5.00	\$240.00	\$9.95	\$1,210
06 June 22	Buy	VOO	Vanguard S&P 500 ETF	5.00	\$365.00	\$9.95	\$1,835
06 June 22	Buy	QQQ	Invesco QQQ Trust	5.00	\$290.00	\$9.95	\$1,460

Transaction Log

Liam Mitchell

4 transactions | 4 buys | 0 sells | Total invested: \$6,240 | Total brokerage: \$29.85

Date	Side	Ticker	Instrument	Qty	Price	Fee	Total
05 Jan 24	Buy	BTC/USD	Bitcoin US Dollar	0.05	\$44,200	\$0.00	\$2,210
15 June 23	Buy	AMD	Advanced Micro Devices, Inc.	10.00	\$115.00	\$9.95	\$1,160
01 Feb 23	Buy	TSLA	Tesla, Inc.	5.00	\$190.00	\$9.95	\$959.95
05 Sept 22	Buy	VOO	Vanguard S&P 500 ETF	5.00	\$380.00	\$9.95	\$1,910

Transaction Log

Olivia Mitchell

2 transactions | 2 buys | 0 sells | Total invested: \$2,135 | Total brokerage: \$19.90

Date	Side	Ticker	Instrument	Qty	Price	Fee	Total
06 Mar 23	Buy	VOO	Vanguard S&P 500 ETF	3.00	\$395.00	\$9.95	\$1,195
06 Mar 23	Buy	QQQ	Invesco QQQ Trust	3.00	\$310.00	\$9.95	\$939.95

Transaction Log

Marcus Chen

13 transactions | 11 buys | 2 sells | Total invested: \$58,990 | Total brokerage: \$119.40

Date	Side	Ticker	Instrument	Qty	Price	Fee	Total
01 Nov 23	Sell	PLTR	Palantir Technologies Inc.	100.00	\$19.80	\$9.95	\$1,990
01 Sept 23	Buy	BTC/USD	Bitcoin US Dollar	0.75	\$26,100	\$0.00	\$19,575
01 May 23	Buy	QQQ	Invesco QQQ Trust	15.00	\$325.00	\$9.95	\$4,885
16 Jan 23	Buy	PLTR	Palantir Technologies Inc.	200.00	\$7.50	\$9.95	\$1,510
01 Nov 22	Buy	MELI	MercadoLibre, Inc.	3.00	\$920.00	\$9.95	\$2,770
01 Nov 22	Buy	META	Meta Platforms Inc Class A	40.00	\$90.00	\$9.95	\$3,610
15 June 22	Buy	SHOP	Shopify Inc.	50.00	\$32.00	\$9.95	\$1,610
10 Feb 22	Sell	META	Meta Platforms Inc Class A	25.00	\$220.00	\$9.95	\$5,510
01 Sept 21	Buy	META	Meta Platforms Inc Class A	25.00	\$360.00	\$9.95	\$9,010
15 July 21	Buy	ASML	ASML Holding N.V. New York Registry Shares	5.00	\$680.00	\$9.95	\$3,410
01 June 21	Buy	TSM	Taiwan Semiconductor Manufacturing Co. Ltd. ADR	40.00	\$118.00	\$9.95	\$4,730
10 May 21	Buy	GOOGL	Alphabet Inc.	30.00	\$112.00	\$9.95	\$3,370
15 Apr 21	Buy	NVDA	NVIDIA Corporation	30.00	\$150.00	\$9.95	\$4,510

Transaction Log

Priya Sharma

14 transactions | 13 buys | 1 sells | Total invested: \$41,089 | Total brokerage: \$139.30

Date	Side	Ticker	Instrument	Qty	Price	Fee	Total
01 Feb 24	Buy	BND	Vanguard Total Bond Market Index Fund	30.00	\$71.50	\$9.95	\$2,155
10 Jan 24	Sell	JNJ	Johnson & Johnson	10.00	\$158.00	\$9.95	\$1,590
15 Aug 23	Buy	TSM	Taiwan Semiconductor Manufacturing Co. Ltd. ADR	20.00	\$96.00	\$9.95	\$1,930
01 Mar 23	Buy	NVO	Novo Nordisk A/S Sponsored ADR	20.00	\$145.00	\$9.95	\$2,910
01 Sept 22	Buy	VXUS	Vanguard Total International Stock Index Fund	40.00	\$50.00	\$9.95	\$2,010
01 June 22	Buy	AMT	American Tower Corporation	10.00	\$265.00	\$9.95	\$2,660
15 Apr 22	Buy	VOO	Vanguard S&P 500 ETF	10.00	\$410.00	\$9.95	\$4,110
01 Feb 22	Buy	COST	Costco Wholesale Corporation	5.00	\$510.00	\$9.95	\$2,560
01 Oct 21	Buy	VYM	Vanguard High Dividend Yield ETF	30.00	\$107.00	\$9.95	\$3,220
01 Sept 21	Buy	O	Realty Income Corporation	60.00	\$71.00	\$9.95	\$4,270
16 Aug 21	Buy	PG	Procter & Gamble Co	20.00	\$142.00	\$9.95	\$2,850
02 Aug 21	Buy	JNJ	Johnson & Johnson	25.00	\$172.00	\$9.95	\$4,310
15 July 21	Buy	V	Visa Inc. Class A	15.00	\$235.00	\$9.95	\$3,535
12 July 21	Buy	JPM	JPMorgan Chase & Co.	30.00	\$152.00	\$9.95	\$4,570