

# PORTFOLIO GROWTH

Annual Performance Review Tracking

FY 2023 - 2024

\$250k \$200k \$150k \$100k \$50k \$0

**\$102k**

**Q1 2023**

**\$115k**

**Q2 2023**

**\$128k**

**Q3 2023**

**\$154k**

**Q4 2023**

**\$182k**

**Q1 2024**

**\$210k**

**Q2 2024**

Total Value **\$210,450.00**

Annual ROI **+18.4%**

Dividends **\$4,215.10**

Risk Level **Moderate**