

ASSET ALLOCATION STRATEGY

Performance Summary Analysis

Report ID: #AS-2024-001

Date: October 24, 2024



Current Allocation
Target Benchmark

Asset Class	Weight (%)	Current Value	YTD Return
US Large Cap	45.0%	\$450,000	+12.4%
International Equity	20.0%	\$200,000	+5.2%
Government Bonds	25.0%	\$250,000	-1.8%
Cash & Commodities	10.0%	\$100,000	+3.1%

This document is a performance template for visualization purposes only. Past performance does not guarantee future results.