Your AI Optimized Portfolio

YOUR PORTFOLIO, AI-ENHANCED

What sets the aisot AI Insights Platform apart, is its ability to tailor portfolios to individual investment goals and risk appetites. Whether you're a conservative investor focusing on blue-chip AI integrators or seeking the high-reward potential of tech startups making their mark, aisot's platform can guide your strategy. It dynamically adjusts your portfolio based on the latest market trends and breakthroughs in AI, ensuring your investments remain at the innovation frontier.

YOUR PORTFOLIO: OVERVIEW & DISCUSSION

Creating a powerful portfolio of the top 20 top performing titles, accounting for more than 35% of the index:

- Microsoft Corporation MSFT
- Apple Inc., AAPL
- NVIDIA Corporation, NVDA
- Amazon.com, Inc., AMZN
- Alphabet Inc., GOOGL
- Meta Platforms, Inc., META
- Tesla, Inc., TSLA
- Broadcom Inc., AVGO
- Adobe Inc., ADBE
- Salesforce, Inc., CRM
- Advanced Micro Devices, Inc., AMD
- Netflix, Inc., NFLX
- Cisco Systems, Inc., CSCO
- Oracle Corporation, ORCL
- Intuit Inc., INTU
- QUALCOMM Incorporated, QCOM
- ServiceNow, Inc., NOW
- International Business Machines Corporation, IBM
- Texas Instruments Incorporated, TXN
- Intel Corporation, INTC

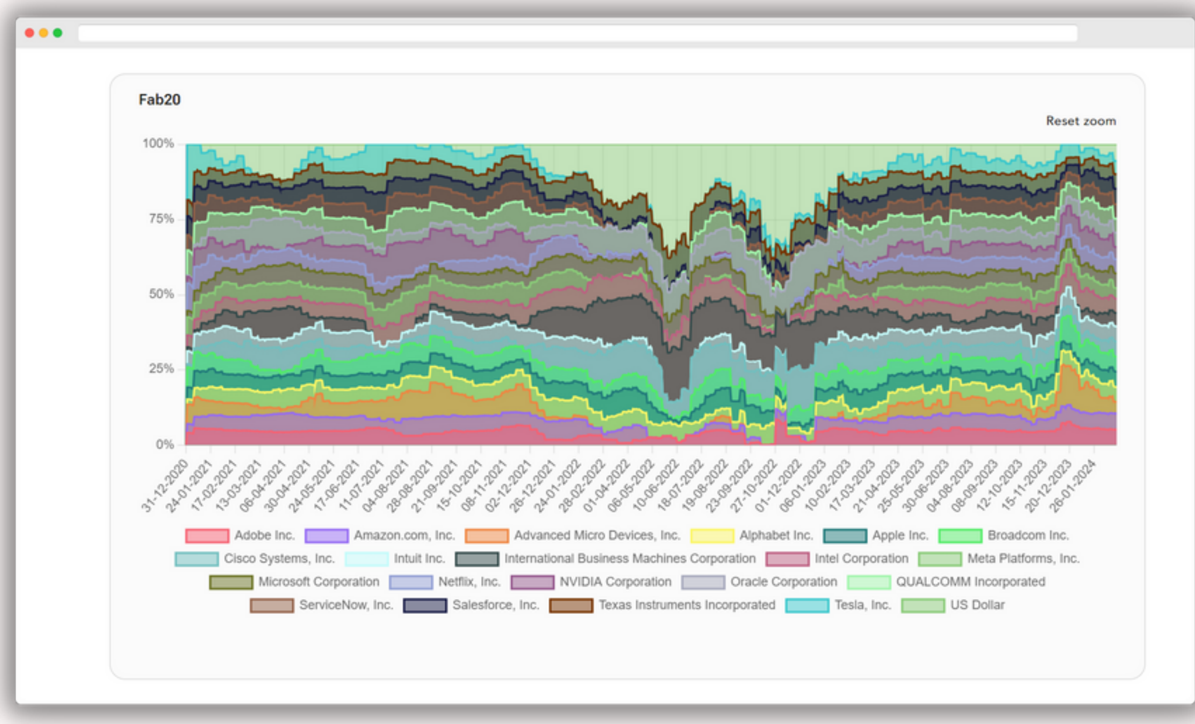
DESIRED RESTRICTIONS

- Volatility target of 20%
- Maximum turnover: 100%
- Maximum cash allocation of 50%,
- Min/Max weightings: 0-100%
- Fees: 10 bps.

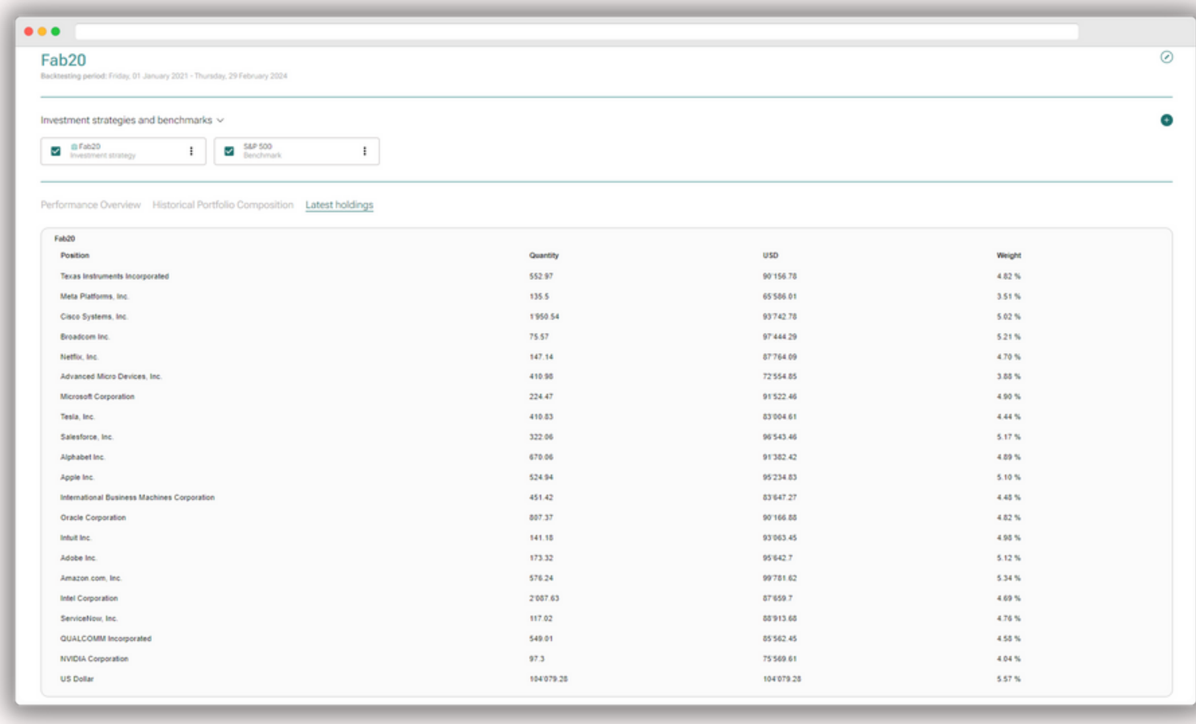
Here's the result: The Sharpe and Sortino ratios of the AI supported portfolio have increased substantially, achieving our goal of keeping drawdown and volatility low, comparable to the S&P 500, while securing a cumulative return that's roughly three times higher than that of the S&P 500 over the same period.

	Fab20: Optimized	S&P 500
Sharpe	0.9311	0.6336
Sortino	1.3598	0.9057
Max Drawdown	-0.3547	-0.2542
Annualized Volatility	0.2320	0.1700
Annualized Return	0.2082	0.0977

Here, we observe the historical allocation strategy of the portfolio. It is evident that the platform strategically utilized cash (light green, on top) during market downturns to maintain control over volatility and drawdowns.



Finally, the AI Insights Platform produces up-to-date portfolio holdings, offering potentially actionable insights for the discerning professional investor.


Fab20

Backtesting period: Friday, 01 January 2021 - Thursday, 29 February 2024

Investment strategies and benchmarks

Fab20 Investment strategy

S&P 500 Benchmark

Performance Overview Historical Portfolio Composition Latest holdings

Fab20

Position	Quantity	USD	Weight
Texas Instruments Incorporated	552.97	90'156.78	4.82 %
Meta Platforms, Inc.	135.5	65'586.01	3.51 %
Cisco Systems, Inc.	1'950.54	93'742.78	5.02 %
Broadcom Inc.	75.57	97'444.29	5.21 %
Netflix, Inc.	147.14	87'764.09	4.70 %
Advanced Micro Devices, Inc.	410.98	72'554.85	3.88 %
Microsoft Corporation	224.47	91'522.46	4.90 %
Tesla, Inc.	410.83	83'004.61	4.44 %
Salesforce, Inc.	322.06	96'543.46	5.17 %
Alphabet Inc.	670.06	91'382.42	4.89 %
Apple Inc.	524.94	95'234.83	5.10 %
International Business Machines Corporation	451.42	83'647.27	4.48 %
Oracle Corporation	807.37	90'166.88	4.82 %
Intuit Inc.	141.18	93'063.45	4.98 %
Adobe Inc.	173.32	95'642.7	5.12 %
Amazon.com, Inc.	576.24	99'781.62	5.34 %
Intel Corporation	2'087.63	87'659.7	4.69 %
ServiceNow, Inc.	117.02	88'913.68	4.76 %
QUALCOMM Incorporated	549.01	85'562.45	4.58 %
NVIDIA Corporation	97.3	75'569.61	4.04 %
US Dollar	104'079.28	104'079.28	5.57 %

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