

1-YR Performance of S&P 500 and NASDAQ vs Big Bank Boss Investment Account (As of April 18, 2026)

S&P 500 (^GSPC) ☆

7,126.06 +84.78 (+1.20%)

At close: 4:38:34 PM EDT

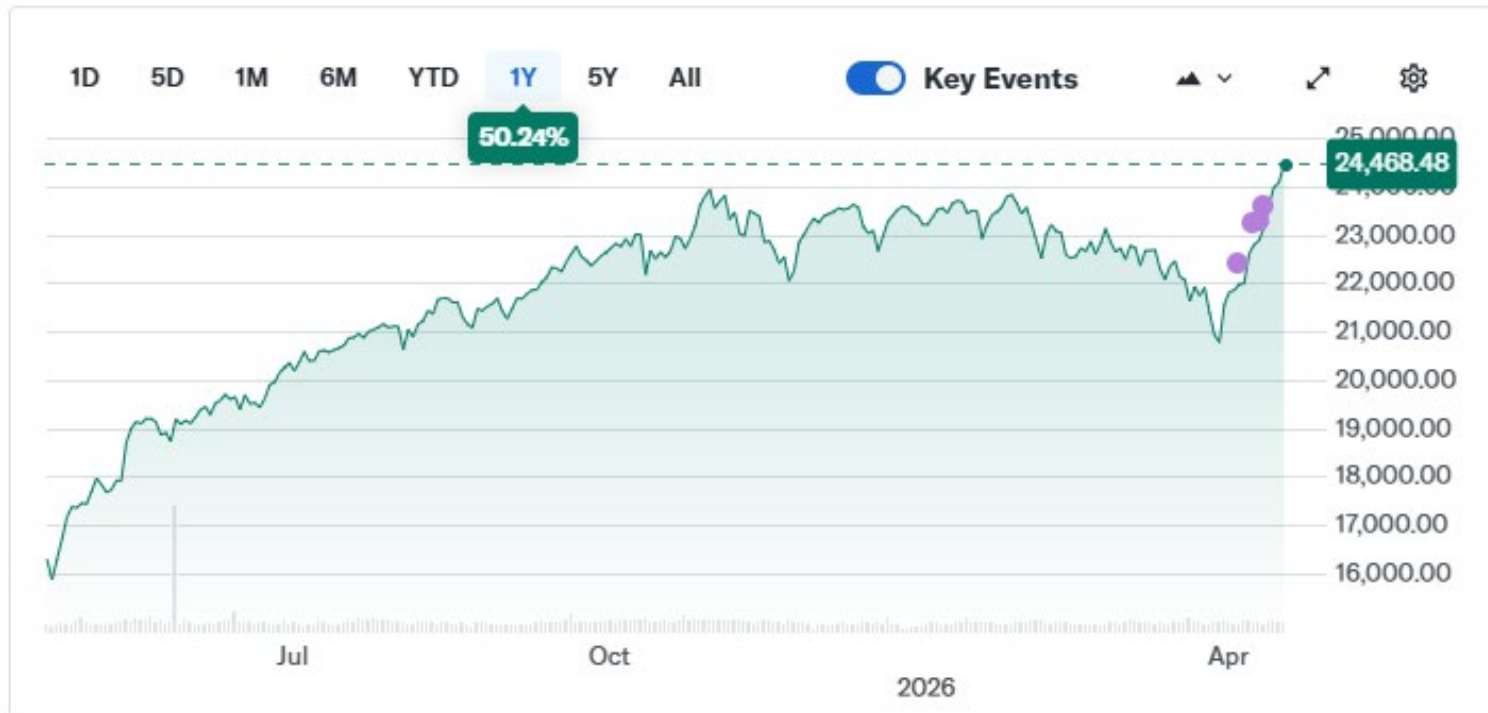


Previous Close	7,041.28	Volume	3,621,555,000	52 Week Range	5,101.63 - 7,147.52
Open	7,074.55	Day's Range	7,074.55 - 7,147.52	Avg. Volume	5,709,481,311

NASDAQ Composite (^IXIC) ☆

24,468.48 +365.78 (+1.52%)

At close: 5:15:59 PM EDT



Previous Close	24,102.70	Volume	8,769,463,000	52 Week Ra...	15,685.33 - 24,519.51
Open	24,338.01	Day's Range	24,286.47 - 24,519.51	Avg. Volume	8,943,089,180

Summary

Updated: 07:55:09 PM ET, 04/17/2026



Total Value

Total Value ⓘ

\$87,218.67

Day Change ⓘ

+\$1,366.24 (+1.59%)

1-Year Change

+\$44,121.71 (+102.38%)

Table View

1M

3M

6M

YTD

1Y

2Y



Risk vs. Return

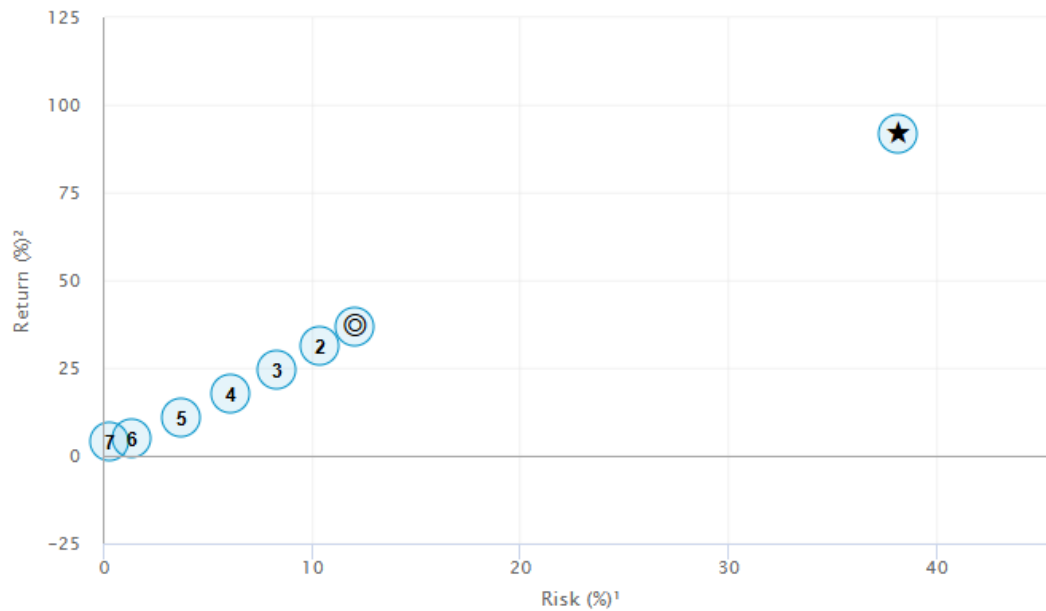


From 04/18/2025-04/17/2026:

This chart shows how your portfolio compares to different Schwab Blended Benchmarks. A Schwab Blended Benchmark represents different combinations of stocks, bonds, and cash. Different Schwab Blended Benchmarks represent different tradeoffs of risk and return.

[How to read the Risk vs. Return chart](#)

Indicator Lines



	Account or Portfolio	Risk (%) ¹	Return (%) ²
★	Boss 1	38.14%	91.97%
🎯	Aggressive	12.06%	36.76%
2	Moderately Aggressive	10.40%	31.28%
3	Moderate	8.28%	24.41%
4	Moderately Conservative	6.12%	17.72%
5	Conservative	3.68%	11.03%
6	Short Term	1.33%	4.96%
7	FTSE 3-Month Treasury Bill (Risk Free)	0.26%	4.19%

Positions

▼ Equities

Symbol / Name	Quantity	Price	Price Change \$ %	Market Value	Day Change \$ %	Cost Basis	▼ Gain / Loss ⁱ \$ %	Ratings
▶ NVDA NVIDIA CORP	94	\$201.68 †	+1.68%	\$18,957.92 †	+\$313.02	\$1,548.45	+1,124.32%	B
▶ VRT VERTIV HLDGS CO CLASS C...	88	\$307.34 †	+4.49%	\$27,045.92 †	+\$1,162.48	\$9,160.00	+195.26%	C
▶ WFC WELLS FARGO & CO	59	\$81.41 †	+0.2%	\$4,803.19 †	+\$9.44	\$1,681.16	+185.71%	C
▶ CRWV COREWEAVE INC CLASS CL...	138	\$116.85 †	-2.27%	\$16,125.30 †	-\$373.98	\$10,168.33	+58.58%	--
▶ CRWD CROWDSTRIKE HLDGS INC ...	3	\$423.95 †	+1.37%	\$1,271.85 †	+\$17.25	\$974.54	+30.51%	C
▶ WRD WERIDE INC FUNSPONSOR...	1,109	\$8.21 †	+2.11%	\$9,104.89 †	+\$188.53	\$10,079.14	-9.67%	--
▶ SMCI SUPER MICRO COMPUTER I...	297	\$28.56 †	+0.56%	\$8,482.32 †	+\$47.52	\$14,114.56	-39.9%	D
▶ RNG RINGCENTRAL INC CLASS C...	33	\$40.39 †	+0.15%	\$1,332.87 †	+\$1.98	\$4,443.58	-70%	C
Equities Total				\$87,124.26 †	+\$1,366.24	\$52,169.76	+67%	