

President's Investment Challenge

Team: HiVooDoogardens

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<https://hivoodoo.garden>

Week: Progress Report 2 (Feb. 24 - Feb. 28)

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Presidents Investment Challenge | Spring 2025

WEEK 2 PROGRESS REPORTS

Portfolio Overview

This week, our strategy focused on risk management, hedging short positions, and stabilizing our holdings while maintaining a diversified mix of equities, ETFs, and bonds.

Key Performance Metrics

- **Total Portfolio Value:** \$500,000+ (including unrealized gains/losses)
- **Top Performing Position:** VO (+1.03%)
- **Biggest Decliner:** IXUS (-1.60%)
- **Closed Positions:**
 - BABA (Short) → \$607 loss
 - Solana (Short) → \$528 net gain
- **Options Strategy:** GOOG call hedge (+6.25%)

Strategy Insights & Next Steps

- **Equities:** Holding a mix of **large-cap (AMZN, GOOG)**, **mid-cap (IJH, IJR)**, and **international exposure (IXUS)** to diversify.
- **Bonds**
& **Stability:** Positions in **AGG, ISTB** provide safety against volatility.
- **Short Positions:** **GOOG remains a risk; hedging via options mitigates potential losses.**
- **Next Steps:**
 - Evaluate GOOG's price movement and decide whether to hold the short or close it.
 - Reduce underperforming positions (IXUS) and reallocate capital.
 - Strengthen our cash position or move into higher-yielding assets.

Overall, we've balanced risk well, managed short exposure effectively, and positioned our portfolio for stability. Looking ahead, we aim for improved risk-adjusted returns while keeping capital protected.

#StockTrakChallenge #PortfolioUpdate #SmartInvesting