

Investment Strategy Proposal

Prepared by: FinancialAdvisor
Prepared for: Valued Client

• Live

Gold (XAU)

Price: ▲ \$4,057.50

Last updated on 12:51 PM

DCA Simulator Pro

Professional dollar-cost averaging simulator

Currency:

USD (\$)

Show Stablecoins

Adjust for Inflation (3% YoY)

Expand

Equal DCA

Lump Sum

Dynamic DCA

Buy The Dip

Future Projections

Portfolio 📈

Take Profit 💰

Monte Carlo 🎲

Value Averaging 📊

Start-Date Analysis 📅

Gamification 🏆

Asset

Amount

Fee (%)

APY (%)

Auto-DRIP

STCG Tax %

LTCG Tax %

Frequency

XAU - Gold 🔒

10

0.1

10

No

25

15

Weekly

Day

Start Date

End Date

Saturday

2000-01-01 📅

2026-06-01 📅

Compare to Asset (Optional)

None

↔

☐ Vs. Lump Sum

☐ Show Bitcoin Halvings

AI Optimize

📊 Estimated Capital Gains Tax (FIFO): \$8,027.95 withheld automatically.

Total Invested

\$13,480.00

Portfolio Value

\$204,957.68

Gain / Loss

+\$191,477.68

ROI

+1420.46%

Accumulated Asset Amount

107.86247614

Average price:

\$124.97

🏛️ INSTITUTIONAL RISK METRICS

MAX DRAWDOWN

-26.1%

SHARPE RATIO

0.21

WIN RATE

98.7%

MONEY-WEIGHTED RETURN

+21.96%



Monday has the best average ROI at 393.92% for XAU

Stop losing, start DCA now!

📅 DCA in XAU on Inter IL

👛 DCA in XAU on ColmexPro

📊 DCA in XAU on TradingView

📅 MONTHLY RETURN HEATMAP														
Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD	
2026	5.04%	11.77%	-13.49%	5.90%	-2.54%	-9.91%	-	-	-	-	-	-	-5.56%	
2025	6.90%	6.55%	6.03%	7.13%	1.12%	0.27%	2.59%	5.15%	9.48%	9.89%	3.37%	8.16%	90.20%	
2024	-1.49%	1.82%	9.77%	6.07%	0.63%	0.71%	3.00%	5.74%	6.81%	4.41%	-2.17%	-0.78%	39.48%	
2023	6.76%	-5.52%	10.38%	1.33%	-1.59%	-0.56%	3.09%	-1.80%	-2.41%	8.39%	1.42%	3.95%	24.59%	
2022	-0.55%	6.47%	4.33%	-1.38%	-2.33%	-0.62%	-2.59%	-0.80%	-4.53%	0.57%	7.72%	4.74%	10.67%	
2021	-0.83%	-5.77%	0.97%	3.34%	8.04%	-5.93%	2.96%	0.96%	-2.98%	2.84%	0.86%	2.19%	5.95%	
2020	4.55%	0.47%	4.58%	6.91%	1.70%	2.80%	7.83%	4.50%	-4.75%	1.99%	-4.39%	6.27%	36.42%	
2019	2.11%	3.20%	-1.83%	0.10%	0.58%	10.88%	1.36%	8.07%	-0.59%	0.76%	-1.36%	4.05%	29.95%	
2018	4.23%	-1.01%	0.51%	0.54%	-0.56%	-3.11%	-1.58%	-0.61%	-0.32%	4.20%	-0.21%	5.78%	7.73%	
2017	4.07%	6.56%	0.04%	2.36%	0.85%	-0.17%	1.90%	2.65%	0.06%	-0.29%	2.18%	2.46%	24.74%	
2016	4.59%	10.06%	0.86%	6.52%	-5.16%	9.54%	3.13%	-1.32%	1.93%	-3.73%	-6.95%	-1.50%	17.35%	
2015	7.94%	-4.45%	-0.33%	-1.33%	2.13%	-0.66%	-6.76%	5.33%	1.88%	0.52%	-6.79%	2.73%	-0.92%	
2014	4.74%	5.46%	-1.38%	1.27%	-3.36%	6.67%	-0.48%	-0.42%	-4.88%	2.15%	-3.67%	2.45%	7.96%	
2013	0.82%	-4.37%	2.35%	-8.18%	-3.89%	-10.94%	8.79%	6.59%	-3.43%	1.79%	-6.67%	-2.04%	-19.07%	
2012	11.41%	3.25%	-5.09%	0.41%	-5.03%	3.15%	1.64%	3.96%	7.03%	-2.69%	3.11%	-4.63%	16.06%	
2011	-1.96%	5.84%	1.98%	10.10%	-0.54%	-1.61%	9.51%	10.98%	-8.06%	7.61%	-2.77%	-6.25%	24.67%	
2010	-1.01%	4.01%	-0.54%	5.19%	6.08%	4.35%	-5.03%	5.36%	5.62%	5.67%	1.12%	2.04%	37.02%	
2009	7.51%	2.27%	-1.25%	-0.28%	8.11%	-3.18%	2.03%	1.36%	4.22%	5.95%	13.75%	-5.27%	38.83%	
2008	9.22%	4.51%	-0.59%	-3.96%	0.93%	5.50%	0.44%	-9.65%	7.25%	-16.79%	12.95%	7.42%	13.66%	
2007	2.21%	6.75%	-2.03%	3.10%	-2.76%	-0.16%	2.57%	1.95%	12.18%	6.30%	5.87%	2.84%	44.27%	
2006	8.79%	0.75%	0.95%	17.38%	0.57%	-9.46%	9.48%	-1.29%	-2.86%	0.67%	5.84%	1.96%	33.00%	
2005	-2.72%	2.89%	-1.64%	3.34%	-2.76%	5.67%	-1.48%	2.47%	6.71%	2.96%	4.79%	6.00%	28.10%	
2004	-1.56%	-0.73%	7.22%	-5.68%	0.67%	3.00%	-2.06%	3.85%	1.92%	5.90%	5.58%	-0.92%	17.13%	
2003	6.14%	-3.72%	-5.62%	2.16%	10.13%	-4.56%	5.79%	4.53%	2.08%	2.89%	2.94%	4.61%	27.35%	
2002	1.45%	5.64%	4.08%	3.69%	3.54%	-1.30%	-2.53%	3.79%	3.00%	-1.23%	1.92%	10.84%	30.42%	
2001	-2.30%	0.00%	-0.41%	2.82%	5.61%	-1.53%	-0.41%	2.45%	7.87%	-4.12%	-1.07%	2.13%	8.09%	
2000	-	-	-	-	-	-	-	-	0.36%	-2.21%	1.18%	2.36%	2.19%	