

Legacy Labs Investment Platform – AI Assisted

Portfolio Tracking • Real-Time Market Data • Performance Analytics • Risk & Classification

Individual Stocks

Breaking News	Symbol	Company	Purchased Date	Shares	Purchased Price/Share	Total Investment	Current Price	Current Value	Potential Gain/Loss	+/- %	Fund Mix Type	Risk Level	Actions
>	ACHR	Archer	2026-04-17	400	\$6.28	\$2,512.00	\$5.47	\$2,187.96	-\$324.04	-12.90%	Experimental	6	 
>	ARM	ARM	2026-02-27	39	\$126.62	\$4,938.18	\$241.88	\$9,433.13	+\$4,494.95	+91.02%	Experimental	6	 
>	JOBY	Joby Aviation	2026-04-17	260	\$9.64	\$2,506.40	\$6.26	\$1,626.30	-\$880.10	-35.11%	Experimental	6	 
>	LLY	Eli Lilly	2026-06-11	7	\$1,142.00	\$7,994.00	\$1,142.62	\$7,998.34	+\$4.34	+0.05%	Core Moderate	3	 
>	MDT	Medtronic	2026-03-30	88	\$85.29	\$7,505.52	\$94.47	\$8,312.92	+\$807.40	+10.76%	Core Moderate	3	 
>	NOW	Service Now	2026-06-11	47	\$106.62	\$5,011.14	\$146.07	\$6,865.29	+\$1,854.15	+37.00%	Satellite Growth	3	 
>	NVO	Nova Nordisk	2026-06-11	60	\$42.31	\$2,538.60	\$42.77	\$2,566.19	+\$27.59	+1.09%	Core Moderate	3	 
>	SPCX	SpaceX	2026-06-12	35	\$0.00	\$0.00	\$143.98	\$5,039.30	+\$5,039.30	—	Satellite Growth	3	 
Totals				936		\$33,005.84		\$44,029.43	+\$11,023.59	+33.40%			

Compares investment vs. current state and calculations potential gains / losses

Supports a variety of investment products:
Stocks, ETFs, Market Linked Notes

Exchange - Traded Fund (ETFs)												
Symbol	ETF Name	Purchased Date	Shares	Purchased Price/Share	Total Investment	Current Price	Current Value	Potential Gain/Loss	+/- %	Fund Mix Type	Risk Level	Actions
>	ARKQ ARK Autonomous Tech & Robotics	2026-04-17	39	\$130.47	\$5,088.33	\$119.53	\$4,661.48	-\$426.85	-8.39%	Satellite Growth	4	 
>	ARKX ARK Space & Defence Innovation	2026-04-17	148	\$33.83	\$5,006.84	\$31.67	\$4,687.16	-\$319.68	-6.38%	Satellite Growth	4	 
>	COWZ Pacer US Cash Cows 100 ETF	2026-06-11	158	\$63.51	\$10,034.58	\$70.74	\$11,176.13	+\$1,141.55	+11.38%	Core Moderate	3	 
>	DAPR State Street® SPDR® S&P 500® ETF Trust	2026-04-20	125	\$39.94	\$4,992.50	\$41.46	\$5,182.50	+\$190.00	+3.81%	Core Moderate	3	 
>	XLK State Street Tech Sector	2026-03-30	38	\$131.38	\$4,992.44	\$183.85	\$6,986.11	+\$1,993.67	+39.93%	Satellite Growth	4	 
Totals			508		\$30,114.69		\$32,693.38	+\$2,578.69	+8.56%			

Investment Fund Mix

Fund Mix

Core Moderate

41%

\$43,065.20

Satellite Growth

19%

\$20,098.75

Experimental

10%

\$9,956.58

Money Market / Cash

30%

\$31,593.47

Risk Mix

Capital Preservation

1

30%

\$31,593.47

Conservative Growth

2

0%

\$0.00

Balanced Growth

3

46%

\$48,076.34

Growth Oriented

4

14%

\$15,087.61

Aggressive Opportunistic

5

10%

\$9,956.58

Fund Mix Type	Investment Amount	Risk Level Mix	% of Fund Value	Target Fund Mix %	Target Fund Mix Amount	Allocation % +/-	Allocation \$ +/-
Core Moderate	\$43,065.20	3 100%	41.13%	30%	\$31,414.20	+11.13%	+\$11,651.00
Satellite Growth	\$20,098.75	3 25% 4 75%	19.19%	40%	\$41,885.60	-20.81%	-\$21,786.85
Experimental	\$9,956.58	5 100%	9.51%	20%	\$20,942.80	-10.49%	-\$10,986.22
Money Market / Cash Derived from fund value	\$31,593.47	1 100%	30.17%	10%	\$10,471.40	+20.17%	+\$21,122.07
Total	\$104,714.00		100.00%	100%	\$104,714.00		

Showing dollars and percentages of fund value.

Market Linked Notes														
	Name	Purchased Date	Units	Price/Unit	Total Investment	Buffer	Annualized Payout	Monthly Payout	Index #1	Index #2	Index #3	Fund Mix Type	Risk Level	Actions
>	Barclay Market Linked Note	2026-04-16	10	\$1,000.00	\$10,000.00	30.0%	12.0%	1.0%	NASDAQ +7.79%	S&P 500 +7.68%	Russell 2000 +5.66%	Core Moderate	3	 
Totals			10		\$10,000.00									

Enables setting of portfolio risk mix and tracking to that mix.

Legacy Labs Investment Platform – AI Assisted

Company Information • Financial News • SEC Filings • API Integration • AI-Assisted Development

Company News	Symbol	Company	Date	Shares	Price/Share	Investment	Price	Current Value	Gain/Loss	+/- %	Type	Level	Actions
>	ACHR	Archer	2026-04-17	400	\$6.28	\$2,512.00	\$5.46	\$2,182.00	-\$330.00	-13.14%	Experimental	5	 
>	ARM	ARM	2026-02-27	39	\$126.62	\$4,938.18	\$242.33	\$9,450.87	+\$4,512.69	+91.38%	Experimental	5	 

Company Link

<https://www.arm.com/>

Notes

Tech stock, set to provide compute for edge devices for AI

Headlines (Yahoo Finance feed)

No news posted recently.

Headlines (Google News feed)

What's Going On With Arm Holdings Stock Tuesday? - Benzinga

Benzinga · Sep 15, 2026, 11:10 AM

Why is Arm stock rallying today? By Investing.com - Investing.com South Africa

Investing.com South Africa · Sep 15, 2026, 9:53 AM

Arm Stock Is Down More Than 40%. Here's Why I'm Staying on the Sidelines. - The Motley Fool

The Motley Fool · Sep 15, 2026, 1:07 AM

Arm Stock Is Down More Than 40%. Here's Why I'm Staying on the Sidelines. - Currently.com

Currently.com · Sep 15, 2026, 12:27 AM

ARM Holdings PLC (ARM) Stock Down 9.7% but Still Overvalued -- GF Score: 72/100 - GuruFocus

GuruFocus · Sep 14, 2026, 4:41 PM

SEC filings (EDGAR)

[View SEC filings for ARM](#)

Search uses your company name—pick the matching issuer if more than one appears.

API Connection to bring in real-time data: Stock prices, company information, financial news and SEC filing Information

Investments

View the Fund's Investment Portfolio

+ Add Stock

+ Add ETF

+ Add Note

Add New Stock

Stock Symbol *

e.g. AAPL

Company Name *

e.g. Apple Inc.

Purchased Date *

mm/dd/yyyy

Purchase Price Per Share *

0.00

of Shares Purchased *

0

Fund Mix Type

Select...

Risk Level

Select...

Company Link

https://www.example.com

Notes

Optional notes about this investment...

In app administration and portfolio management

Document archival

Uploaded Documents (20)	
Important Fund Documents Important fund documents will appear here when uploaded.	
September-Meeting---09102026 (2 files) Delete	
LL09-10-16.mp4 123.78 MB • Uploaded by a7fb1dae-918a-4bae-a8e7-b1817e11d37b • Sep 12, 2026, 01:04 PM Type: video/mp4	Download Delete
legacylabs09102026deckFinal.pdf 1.63 MB • Uploaded by be86cef3-11ca-4d3e-92f8-9d5d66aa4b8c • Sep 10, 2026, 01:36 PM Type: application/pdf	Download Delete
> June-Meeting-06042026 (2 files)	
> February-Meeting---02262026 (3 files)	
> March-Meeting---03262026 (3 files)	
> April-Meeting---04162026 (3 files)	

Art Studio – Shopify

Product Inventory Management • Pricing • Order Fulfillment

Inventory management, new products, pricing updates, web content management via Shopify Admin.

shopify

Search

View as

Home

Orders

Products

Collections

Inventory

Purchase orders

Transfers

Gift cards

Customers

Growth

Discounts

Content

Markets

Finance

Analytics

Sales channels

Online Store

Point of Sale

Products

30 days

Average sell-through rate

0% —

Products by days of inventory remaining

No data

ABC produ

\$1,222.00

Import

Export

More actions

	Product	Status	Inventory	Category	Channels	Catalogs	Product type
☐	"The General" 30 x 60 On Canvas	Active	1 in stock	Paintings	4	1	
☐	"Electric Grove" Pair of 5 3/4 X 5 3/4 Cold Wax & Oil On Cradl...	Active	1 in stock	Paintings	4	1	
☐	Mountain Biking Montage	Active	0 in stock	Paintings	4	1	
☐	"Ash" 18 x 18 On Canvas	Active	1 in stock	Paintings	4	1	
☐	"Haze" 18 x 18 On Canvas	Active	1 in stock	Paintings	4	1	
☐	"Heat" 18 x 18 On Canvas	Active	1 in stock	Paintings	4	1	

Rich Text Area

General" 30 x 60 On Canvas

Active

Title

"The General" 30 x 60 On Canvas

Description

Paragraph

B

I

U

A

View as

Light: Portraits of a Whitetail Herd

een Stillness and Flight, a series inspired by the

More

rounding our Arkansas home.

since, The General holds a particular place within

wasn't simply his size or stature. It was the

strength paired

him.

loose drawing

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Media

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