



Envelope # BPTGHHBBDMVC

SAMATHA ADUSUMILLI
8309 GREENLEAF RIDGE WAY
CONROE TX 77385-1120

Your Portfolio Value: **\$19,436.71**

Change Since January 1: **▲ \$4,104.63**

Beginning Portfolio Value as of Jan 1, 2023 ^Z **\$15,332.08**

Additions 2,400.00

Change in Investment Value * 1,704.63

Ending Portfolio Value as of Dec 31, 2023 ^{}** **\$19,436.71**

Contact Information

Online	Fidelity.com
FAST®-Automated Telephone	(800) 544-5555
Customer Service	(800) 544-6666
U.Fund College Investing Plan	(800) 544-2776

FOR YOUR INFORMATION

This statement is not a replacement for your tax forms and may not reflect all adjustments necessary for your tax reporting purposes. Refer to your IRS tax forms including your Form(s) 1099 and Form(s) 5498, which will be mailed to you under separate cover.

* Reflects appreciation or depreciation of your holdings due to price changes, transactions from Other Activity In or Out and Multi-currency transactions, plus any distribution and income earned during the statement period.

** Excludes unpriced securities.

Z If you added or removed an account to your statement-reporting household during this period, the Beginning Portfolio Value and Change from Last Period are based off the accounts that were in the statement household as of the end of the last period and thus may not accurately reflect the updated statement household.





Portfolio Summary

Accounts Included in This Report

Page	Account Type/Name	Account Number	Beginning Value ^Z	Ending Value
EDUCATION (529) ACCOUNTS				
4	EDUCATION ACCOUNT SAMATHA ADUSUMILLI - PARTICIPANT TOD Aarav Sai Bollepalli - BENEFICIARY	618-154543	\$7,196.98	\$10,873.12
PERSONAL RETIREMENT				
7	FIDELITY TRADITIONAL IRA SAMATHA ADUSUMILLI - TRADITIONAL IRA - FIDELITY MANAGEMENT TRUST CO - CUSTODIAN	221-699740	8,135.10	8,563.59
Ending Portfolio Value			\$15,332.08	\$19,436.71

^Z If you added or removed an account to your statement-reporting household during this period, the Beginning Portfolio Value and Change from Last Period are based off the accounts that were in the statement household as of the end of the last period and thus may not accurately reflect the updated statement household.

Total Portfolio Trades Jan 2023 - Dec 2023: 0

Portfolio Summary (continued)

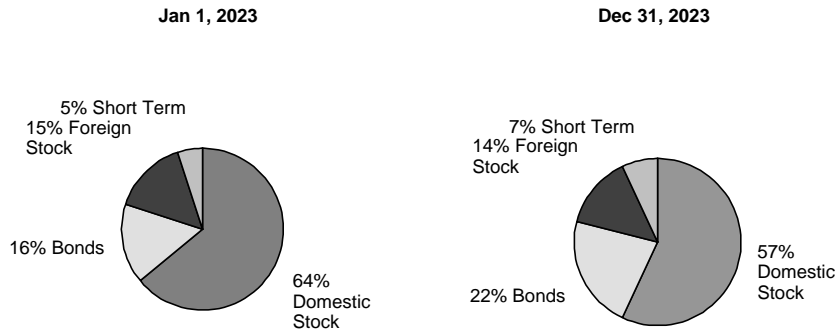
Income Summary

	Year-to-Date
Tax-deferred	\$295.27
Total	\$295.27

IMPORTANT: If you have any unsettled trades pending, the asset allocation presented above may be materially impacted and, depending on the size and scope of such unsettled trades, rendered unreliable. Asset allocation includes Other Holdings and Assets Held Away when applicable. Please note that, due to rounding, percentages may not add to 100%. For further details, please see "Frequently Asked Questions" at [Fidelity.com/Statements](https://www.fidelity.com/statements).

Asset Allocation

The Jan 1 values and asset allocation percentages shown above are based off the accounts that were in your statement household as of the beginning of the year. If you added an account to your statement household after January 1st, those assets are not included in the Jan 1 values or asset allocation percentages.



Asset Class	% of Portfolio Jan 1	% of Portfolio Dec 31
Domestic Stock	64%	57%
Bonds	16	22
Foreign Stock	15	14
Short Term	5	7
Other	-	-



Account Value: **\$10,873.12**

Account # 618-154543
Aarav Sai Bollepalli - BENEFICIARY (529)

Change Since January 1 **▲ \$3,676.14**

Contributions Made in 2023

Contributions	\$2,400.00
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Beginning Account Value as of Jan 1, 2023	\$7,196.98
Additions	2,400.00
Deposits	2,400.00
Change in Investment Value *	1,276.14
Ending Account Value as of Dec 31, 2023	\$10,873.12

College Investment Details

2023 Plan Contribution Cap:	\$500,000.00
Total Contributions Over Life of Plan:	\$9,799.14
2023 Remaining to Contribute:	\$489,105.67

College Contribution Elections

Description	Percent of Contributions
MA PORTFOLIO 2033 (FIDELITY FUND PORT)	100%
Total	100%

* Reflects appreciation or depreciation of your holdings due to price changes, transactions from Other Activity In or Out and Multi-currency transactions, plus any distribution and income earned during the statement period.

Holdings

Description	Percent of Total Value	Quantity	Price per Unit	Total Market Value
MA PORTFOLIO 2033 (FIDELITY FUND PORT)	100%	530.396	\$20.5000	\$10,873.12
Total Market Value				\$10,873.12

Please note that due to rounding, percentages may not add to 100%



Activity

Account # 618-154543
Aarav Sai Bollepalli - BENEFICIARY (529)

Securities Bought & Sold

Settlement Date	Security Name	Symbol/ CUSIP	Description	Quantity	Price	Transaction Cost	Amount
01/05	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	11.130	\$17.97000	-	-\$200.00
02/06	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.582	18.90000	-	-200.00
03/06	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.730	18.64000	-	-200.00
04/05	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.588	18.89000	-	-200.00
05/05	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.521	19.01000	-	-200.00
06/05	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.466	19.11000	-	-200.00
07/05	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.325	19.37000	-	-200.00
08/07	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.220	19.57000	-	-200.00
09/05	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.352	19.32000	-	-200.00
10/05	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.834	18.46000	-	-200.00
11/06	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.599	18.87000	-	-200.00
12/05	MA PORTFOLIO 2033 (FIDELITY FUND PORT) CONTRIBUTION PERIODIC INVESTMENT	MA2033003	You Bought	10.178	19.65000	-	-200.00
Total Securities Bought						-	-\$2,400.00
Net Securities Bought & Sold						-	-\$2,400.00

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Activity

Account # 618-154543
Aarav Sai Bollepalli - BENEFICIARY (529)

Deposits

Date	Reference	Description	Amount
01/05		Eft Funds Received Er44137330 Bank Of America, N.a. *****5005	\$200.00
02/06		Eft Funds Received Er47697707 Bank Of America, N.a. *****5005	200.00
03/06		Eft Funds Received Er51193666 Bank Of America, N.a. *****5005	200.00
04/05		Eft Funds Received Er55177117 Bank Of America, N.a. *****5005	200.00
05/05		Eft Funds Received Er58872786 Bank Of America, N.a. *****5005	200.00
06/05		Eft Funds Received Er62199388 Bank Of America, N.a. *****5005	200.00
07/05		Eft Funds Received Er65793283 Bank Of America, N.a. *****5005	200.00
08/07		Eft Funds Received Er69862696 Bank Of America, N.a. *****5005	200.00
09/05		Eft Funds Received Er73442458 Bank Of America, N.a. *****5005	200.00
10/05		Eft Funds Received Er77508647 Bank Of America, N.a. *****5005	200.00
11/06		Eft Funds Received Er81427289 Bank Of America, N.a. *****5005	200.00
12/05		Eft Funds Received Er85296338 Bank Of America, N.a. *****5005	200.00
Total Deposits			\$2,400.00



Account Summary

Account # 221-699740
SAMATHA ADUSUMILLI - TRADITIONAL IRA

Account Value: **\$8,563.59**

Account Holdings

Change Since January 1 **▲ \$428.49**

Beginning Account Value as of Jan 1, 2023	\$8,135.10
Change in Investment Value *	428.49
Ending Account Value as of Dec 31, 2023	\$8,563.59

Total Account Trades Jan 2023 - Dec 2023: 0

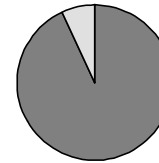
* Reflects appreciation or depreciation of your holdings due to price changes, transactions from Other Activity In or Out and Multi-currency transactions, plus any distribution and income earned during the statement period.

Jan 1, 2023

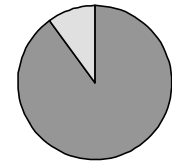
Dec 31, 2023

7% Core Account

10% Core Account



93% Stocks



90% Stocks

Holding Type	Value	% of	Value	% of
	Jan 1	Portfolio Jan 1	Dec 31	Portfolio Dec 31
Stocks	\$7,598	93%	\$7,731	90%
Core Account	536	7	831	10
Total	\$8,135	100%	\$8,563	100%

Income Summary

	Dec 31, 2023
Tax-deferred	\$295.27
Total	\$295.27



Holdings

Account # 221-699740
SAMATHA ADUSUMILLI - TRADITIONAL IRA

Core Account

Description	Quantity	Price Per Unit	Total Market Value	Cost	Unrealized Gain/Loss	Income Earned
FDIC INSURED DEPOSIT AT US BANK IRA ^q NOT COVERED BY SIPC (QUSCQ) -- Interest rate: 2.69% ^h	831.970	\$1.0000	\$831.97	not applicable	not applicable	\$17.75
Total Core Account (10% of account holdings)			\$831.97			\$17.75

Stocks

Description	Quantity	Price Per Unit	Total Market Value	Cost	Unrealized Gain/Loss	Income Earned
Common Stock						
AT&T INC COM USD1 (T)	250.000	\$16.7800	\$4,195.00	\$5,091.28	-\$896.28	\$277.52
BIGCOMMERCE HLDGS INC COM SER 1 (BIGC)	20.000	9.7300	194.60	863.68	-669.08	-
CANOPY GROWTH CORPORATION COM NPV (POST REV SPLIT) ISIN #CA1380357048 SEDOL #BR1G4F8 (CGC)	15.000	5.1100	76.65	1,996.75	-1,920.10	-
FASTLY INC CL A (FSLY)	20.000	17.8000	356.00	767.45	-411.45	-
ROCKET COS INC COM CL A (RKT)	100.000	14.4800	1,448.00	1,642.70	-194.70	-
VIRGIN GALACTIC HOLDINGS INC COM (SPCE)	150.000	2.4500	367.50	2,868.25	-2,500.75	-
VROOM INC COM (VRM)	350.000	0.6025	210.87	6,749.51	-6,538.64	-
WARNER BROS DISCOVERY INC COM SER A (WBD)	60.000	11.3800	682.80	1,542.50	-859.70	-
ZOMEDICA CORP COM NPV ISIN #CA98980M1095 SEDOL #BMWVFN2 (ZOM)	1,000.000	0.2002	200.20	492.60	-292.40	-
Total Common Stock (90% of account holdings)			\$7,731.62	\$22,014.72	-\$14,283.10	\$277.52
Total Stocks (90% of account holdings)			\$7,731.62	\$22,014.72	-\$14,283.10	\$277.52
Total Holdings			\$8,563.59	\$22,014.72	-\$14,283.10	\$295.27

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Holdings

Account # 221-699740
SAMATHA ADUSUMILLI - TRADITIONAL IRA

All positions held in cash account unless indicated otherwise.

Total Cost does not include the cost basis on core, money market or other positions where cost basis is unknown or not applicable.

- h *The stated Interest Rate is the interest rate effective for Cash Balances in your FDIC-Insured Deposit Sweep on the last day of the statement period.*
- q *Customers are responsible for monitoring their total assets at the Program Bank to determine the extent of available FDIC insurance. Subject to the terms of the customer agreement, customers are reminded that funds are swept to a Program Bank the business day following the date that funds are credited to your account and until swept to a Program Bank, funds are covered by SIPC. For additional information, please see the FDIC-Insured Deposit Sweep Disclosures on Fidelity.com.*

Additional Information and Endnotes

The following interested party information is on file for your account:

RAVI BOLLEPALLI
8309 GREENLEAF RIDGE WAY
CONROE TX 77385-1120

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