



## Contributory IRA of

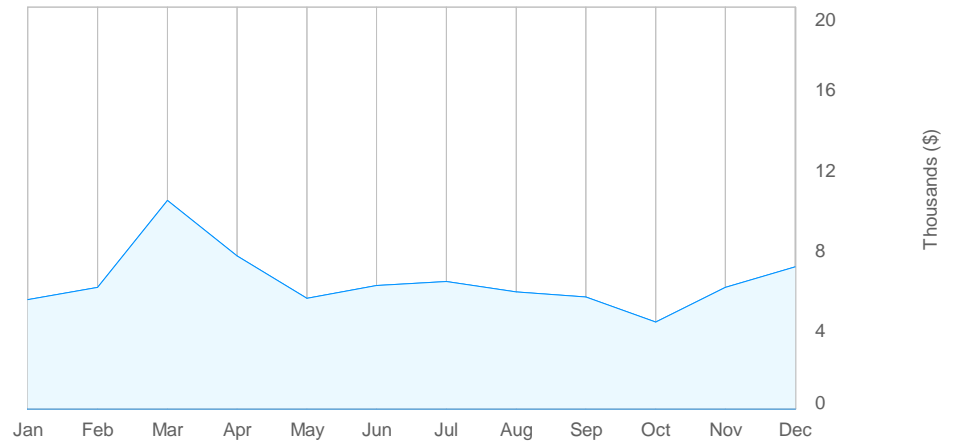
SHYLAJA MUPPIDI  
CHARLES SCHWAB & CO INC CUST  
IRA CONTRIBUTORY

Account Number  
8911-9409

Statement Period  
December 1-31, 2023

## Account Summary

Ending Account Value as of 12/31	Beginning Account Value as of 12/01	Total Value Change (\$)
<b>\$7,077.64</b>	<b>\$6,065.72</b>	<b>\$1,011.92</b>



### Manage Your Account

#### Customer Service and Trading:

Call your Schwab Representative  
1-800-435-4000  
24/7 Customer Service

For the most current records on your account  
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Client Relationship Summaries and Best Interest  
disclosures are at [schwab.com/transparency](https://schwab.com/transparency).  
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### Online Assistance

Visit us online at [schwab.com](https://schwab.com)

Visit [schwab.com/stmt](https://schwab.com/stmt) to explore the features  
and benefits of this statement.

SHYLAJA MUPPIDI  
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250 MCADOO DR  
APT 721  
FOLSOM CA 95630-7521

	This Statement	Previous Statement	Change
Beginning Value	<b>\$6,065.72</b>	\$4,363.81	\$1,701.91
Deposits	<b>500.00</b>	1,000.00	(500.00)
Withdrawals	<b>0.00</b>	0.00	0.00
Dividends and Interest	<b>1.86</b>	0.13	1.73
Transfer of Securities(In/Out)	<b>0.00</b>	0.00	0.00
Market Value Change	<b>510.06</b>	701.78	(191.72)
Fees	<b>0.00</b>	0.00	0.00
<b>Ending Value</b>	<b>\$7,077.64</b>	<b>\$6,065.72</b>	<b>\$1,011.92</b>

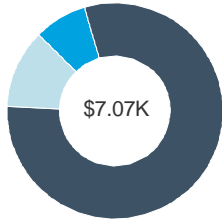


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### Asset Allocation



	This Period	Current Allocation
Cash and Cash Investments	532.00	8%
Equities	5,726.60	81%
Exchange Traded Funds	819.04	12%
<b>Total</b>	<b>\$7,077.64</b>	<b>100%</b>

### Income Summary

	This Period	YTD
Bank Sweep Interest	0.24	5.29
Cash Dividends	1.62	24.72
<b>Total Income</b>	<b>\$1.86</b>	<b>\$30.01</b>

### Top Account Holdings This Period

SYMBOL CUSIP	Description	Market Value	% of Accounts
TSLA	TESLA INC	2,733.28	39%
AEVA	AEVA TECHNOLOGIES INC	1,136.55	16%
QQQ	INVSC QQQ TRUST SRS 1	819.04	12%
GOOGL	ALPHABET INC.	698.45	10%
MWG	MULTI WAYS HOLDINGS LT F	559.50	8%

### Retirement Contribution Details

Contributions	2022	2023
Traditional IRA	6,000.00	6,000.00
<b>Total YTD (\$)</b>	<b>6,000.00</b>	<b>6,000.00</b>

### Gain or (Loss) Summary

	All Positions		Net
	Gain	(Loss)	
This Period	0.00	0.00	0.00
YTD	0.00	(114.43)	(114.43)
<b>Unrealized</b>			<b>(\$4,859.24)</b>

Values may not reflect all of your gains/losses; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Please login to your account at Schwab.com for real-time gain/loss information. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.



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### A Message About Your Account

#### CALIFORNIA RESIDENTS

If your total payments of interest and interest dividends on federally tax-exempt non-California municipal bonds were \$10 or greater **and** you or your Partnership had a California address as of 12/31, Schwab will report this information to the California Franchise Tax Board each tax year, per state statute. 1223-3LZ0

### Positions - Summary

Beginning Value as of	+	Transfer of Securities(In/Out)	+	Dividends Reinvested	+	Cash Activity	+	Change in Market Value	=	Ending Value as of 12/31	Cost Basis	Unrealized Gain/(Loss)
\$6,065.72		\$0.00		\$0.00		\$501.86		\$510.06		\$7,077.64	\$11,404.88	(\$4,859.24)

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### Cash and Cash Investments

Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)	Change in Period Balance(\$)	Pending/Unsettled Cash(\$)	Interest/Yield Rate	% of Acct
Cash					0.00	1.62	1.62	0.43		<1%
Bank Sweep		CHARLES SCHWAB BANK <sup>X,Z</sup>			1,017.52	530.38	(487.14)		0.45%	7%
<b>Total Cash and Cash Investments</b>					<b>\$1,017.52</b>	<b>\$532.00</b>	<b>(\$485.52)</b>			<b>8%</b>

### Positions - Equities

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
AMD	ADVANCED MICRO DEVICE IN <sup>◇</sup>	2.0000	147.41000	294.82	220.00	74.82	N/A	0.00	4%
AEVA	AEVA TECHNOLOGIES INC	1,500.0000	0.75770	1,136.55	1,110.00	26.55	N/A	0.00	16%
GOOGL	ALPHABET INC.	5.0000	139.69000	698.45	465.00	233.45	N/A	0.00	10%
GPRO	GOPRO INC	20.0000	3.47000	69.40	140.00	(70.60)	N/A	0.00	<1%
MWG	MULTI WAYS HOLDINGS LT F	2,490.0000	0.22470	559.50	6,151.62	(5,592.12)	N/A	0.00	8%
RIVN	RIVIAN AUTOMOTIVE INC	10.0000	23.46000	234.60	311.80	(77.20)	N/A	0.00	3%



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Positions - Equities (continued)

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
TSLA	TESLA INC	11.0000	248.48000	2,733.28	2,225.00	508.28	N/A	0.00	39%
<b>Total Equities</b>				<b>\$5,726.60</b>	<b>\$10,623.42</b>	<b>(\$4,896.82)</b>		<b>\$0.00</b>	<b>81%</b>

Positions - Exchange Traded Funds

Symbol	Description	Quantity	Price(\$)	Market Value(\$)	Cost Basis(\$)	Unrealized Gain/(Loss)(\$)	Est. Yield	Est. Annual Income(\$)	% of Acct
QQQ	INVSC QQQ TRUST SRS 1	2.0000	409.52000	819.04	781.46	37.58	0.78%	6.47	12%
<b>Total Exchange Traded Funds</b>				<b>\$819.04</b>	<b>\$781.46</b>	<b>\$37.58</b>		<b>\$6.47</b>	<b>12%</b>

Estimated Annual Income ("EAI") and Estimated Yield ("EY") calculations are for informational purposes only. The actual income and yield might be lower or higher than the estimated amounts. EY is based upon EAI and the current price of the security and will fluctuate. For certain types of securities, the calculations could include a return of principal or capital gains in which case EAI and EY would be overstated. EY and EAI are not promptly updated to reflect when an issuer has missed a regular payment or announced changes to future payments, in which case EAI and EY will continue to display at a prior rate.

Transactions - Summary

Beginning Cash* as of 12/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Fees	=	Ending Cash* as of 12/31
\$1,017.52		\$500.00		\$0.00		(\$987.38)		\$0.00		\$1.86		\$0.00		\$532.00

Other Activity **\$0.00**

Other activity includes transactions which don't affect the cash balance such as stock transfers, splits, etc.

\*Cash (includes any cash debit balance) held in your account plus the value of any cash invested in a sweep money fund.

Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
12/01	Purchase		QQQ	INVSC QQQ TRUST SRS 1 ETF IV	2.0000	390.7281		(781.46)	
12/18	Interest	Bank Interest <sup>X,Z</sup>		BANK INT 111623-121523				0.24	
12/20	Deposit	MoneyLink Txn		Tfr BANK OF AMERICA, N, SRINIVAS SHESHAL				500.00	
12/26	Purchase		MWG	MULTI WAYS HOLDINGS LT F	1,000.0000	0.2059		(205.92)	



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### Transaction Details (continued)

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)	Realized Gain/(Loss)(\$)
12/29	Dividend	Cash Dividend	QQQ	INVSC QQQ TRUST SRS 1				1.62	
<b>Total Transactions</b>								<b>(\$485.52)</b>	<b>\$0.00</b>

Date column represents the Settlement/Process date for each transaction.

### Bank Sweep Activity

Date	Description	Amount	Date	Description	Amount
12/01	<b>Beginning Balance</b> <sup>x,z</sup>	<b>\$1,017.52</b>	12/26	BANK TRANSFER TO BROKERAGE	(205.92)
12/01	BANK TRANSFER TO BROKERAGE	(781.46)	12/31	<b>Ending Balance</b> <sup>x,z</sup>	<b>\$530.38</b>
12/15	BANK INTEREST - CHARLES SCHWAB BANK <sup>x,z</sup>	0.24	12/29	<b>Interest Rate</b> <sup>* z</sup>	<b>0.45%</b>
12/21	BANK CREDIT FROM BROKERAGE <sup>x</sup>	500.00			

\* Your interest period was 11/16/23 - 12/15/23. <sup>z</sup>

### Pending / Open Activity

Activity Type	Date	Action	Symbol/ CUSIP	Description	Quantity	Market Price/ Rate per Share(\$)	Limit Price(\$)	Settle/ Payable Date	Expiration Date	Amount(\$)
Pending	12/28	Special Dividend	QQQ	INVSC QQQ TRUST SRS 1	2.0000	0.2158		01/15		0.43
<b>Total Pending Transactions</b>										<b>\$0.43</b>

Pending transactions are not included in account value.

### Endnotes For Your Account

- ◊ Dividends paid on this security will be automatically reinvested.
- X Bank Sweep deposits are held at FDIC-insured Program Banks, which are listed in the Cash Features Disclosure Statement.

- Z For the Bank Sweep and Bank Sweep for Benefit Plans features, interest is paid for a period that differs from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period.

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capitalized terms have the same meanings as in your Account Agreement. If you receive any other communication from any source other than Schwab which purports to represent your holdings at Schwab



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## Terms and Conditions (continued)

(including balances held at a Depository Institution) you should verify its content with this statement. **Accrued Income:** Accrued Income is the sum of the total accrued interest and/or accrued dividends on positions held in your Account, but the interest and/or dividends have not been received into your Account. Schwab makes no representation that the amounts shown (or any other amount) will be received. Accrued amounts are not covered by SIPC account protection until actually received and held in the Account. **AIP (Automatic Investment Plan) Customers:** Schwab receives remuneration in connection with certain transactions effected through Schwab. If you participate in a systematic investment program through Schwab, the additional information normally detailed on a trade confirmation will be provided upon request. **Average Daily Balance:** Average daily composite of all cash balances that earn interest and all loans from Schwab that are charged interest. **Bank Sweep and Bank Sweep for Benefit Plans Features:** Schwab acts as your agent and custodian in establishing and maintaining your Deposit Account(s) as a feature of your brokerage Account(s). Deposit accounts held through these bank sweep features constitute direct obligations of one or more FDIC insured banks ("Program Banks") that are not obligations of Schwab. Funds swept to Program Banks are eligible for deposit insurance from the FDIC up to the applicable limits for each bank for funds held in the same insurable capacity. The balance in the Deposit Accounts can be withdrawn on your order and the proceeds returned to your brokerage Account or remitted to you as provided in your Account Agreement. For information on FDIC insurance and its limits, as well as other important disclosures about the bank sweep feature(s) in your Account(s), please refer to the Cash Features Disclosure Statement available online or from a Schwab representative. **Cash:** Any Free Credit Balance owed by us to you payable upon demand which, although accounted for on our books of record, is not segregated and may be used in the conduct of this firm's business. **Dividend Reinvestment Customers:** Dividend reinvestment transactions were effected by Schwab acting as a principal for its own account, except for the reinvestment of Schwab dividends, for which an independent broker-dealer acted as the buying agent. Further information on these transactions will be furnished upon written request. **Gain (or Loss):** Unrealized Gain or (Loss) and Realized Gain or (Loss) sections ("Gain/Loss Section(s)") contain a gain or a loss summary of your Account. This information has been provided on this statement at the request of your Advisor, if applicable. This information is not a solicitation or a recommendation to buy or sell. **Schwab does not provide tax advice and encourages you to consult with your tax professional. Please view the Cost Basis Disclosure Statement for additional information on how gain (or loss) is calculated and how Schwab reports adjusted cost basis information to the IRS.** **Interest:** For the Schwab One Interest, Bank Sweep, and Bank Sweep for Benefit Plans features, interest is paid for a period that may differ from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period. For the Schwab One Interest feature, interest accrues daily from the second-to-last business day of the prior month and is posted on the second-to-last business day of the current month. For the Bank Sweep and Bank Sweep for Benefit Plans features, interest accrues daily from the 16th day of the prior month and is credited/posted on the first business day after the 15th of the current month. If, on any given day, the interest that Schwab calculates for the Free Credit Balances in the Schwab One Interest feature in your brokerage Account is less than \$.005, you will not accrue any interest on that day. For balances held at banks affiliated with Schwab in the Bank Sweep and Bank Sweep for Benefit Plans features, interest will accrue even if the amount is less than \$.005. **Margin Account Customers:** This is a combined statement of your margin account and special memorandum account maintained for you under Section 220.5 of Regulation T issued by the Board of Governors of the Federal Reserve System. The permanent record of the separate account as required by Regulation T is available for your inspection. Securities purchased on margin are Schwab's collateral for the loan to you. It is important that you fully understand the risks involved in trading securities on margin. These risks include: 1) You can lose more funds than you deposit in the margin account; 2) Schwab can force the sale of securities or other assets in

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## Terms and Conditions (continued)

client of an independent investment advisor, call us at 800-515-2157. Any oral communications should be re-confirmed in writing to further protect your rights, including rights under the Securities Investor Protection Act (SIPA). If you do not so notify us, you agree that the statement activity and Account balance are correct for all purposes with respect to those brokerage transactions. **IN CASE OF COMPLAINTS:** If you have a complaint regarding your Schwab statement, products or services, please write to Client Service & Support at Charles Schwab & Co., Inc., P.O. Box 982603 El Paso, TX 79998-2603, or call customer service at **800-435-4000**. (Outside the U.S., call **+1-415-667-8400**.) If you're a client of an independent investment advisor, call us at 800-515-2157. **Address Changes:** If you fail to notify Schwab in writing of any change of address or phone number, you may not receive important notifications about your Account, and trading or other restrictions might be placed

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