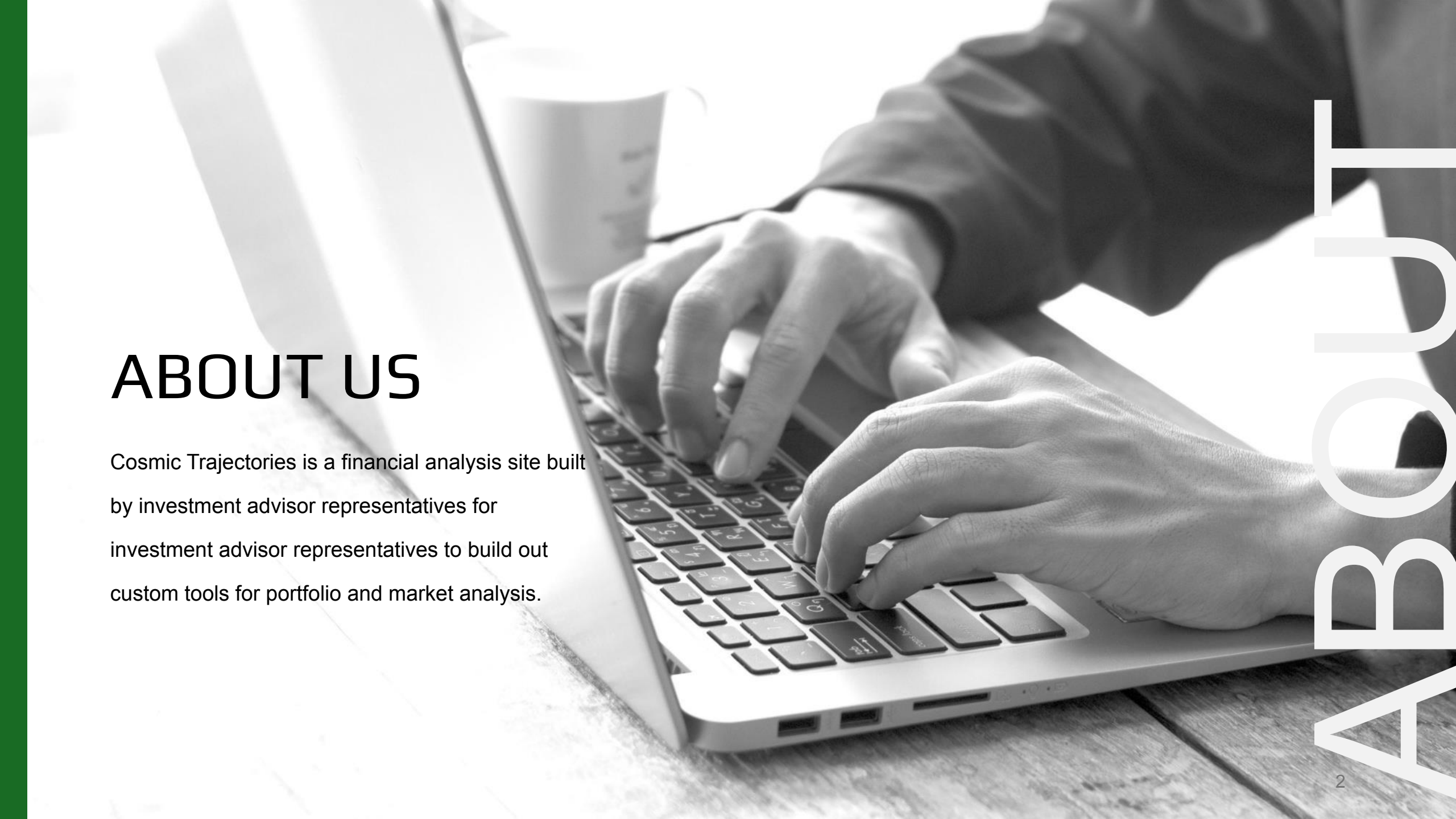




Progress Report II



ABOUT US

Cosmic Trajectories is a financial analysis site built by investment advisor representatives for investment advisor representatives to build out custom tools for portfolio and market analysis.

Home

PROBLEM

SOFTWARE TARGETS TRADERS

Current analytics software is targeted towards traders and chartered analysts and is limited in relevant tools for investment advisors.

OUTDATED TOOLS DOMINATE

Advisors are left utilizing Excel to run the analysis needed in a way accessible to associates, partners, and clients.

HIGH OPPORTUNITY COST

Time is lost keeping data up-to-date for both current portfolio accuracy and current market analysis.

+11,00.00

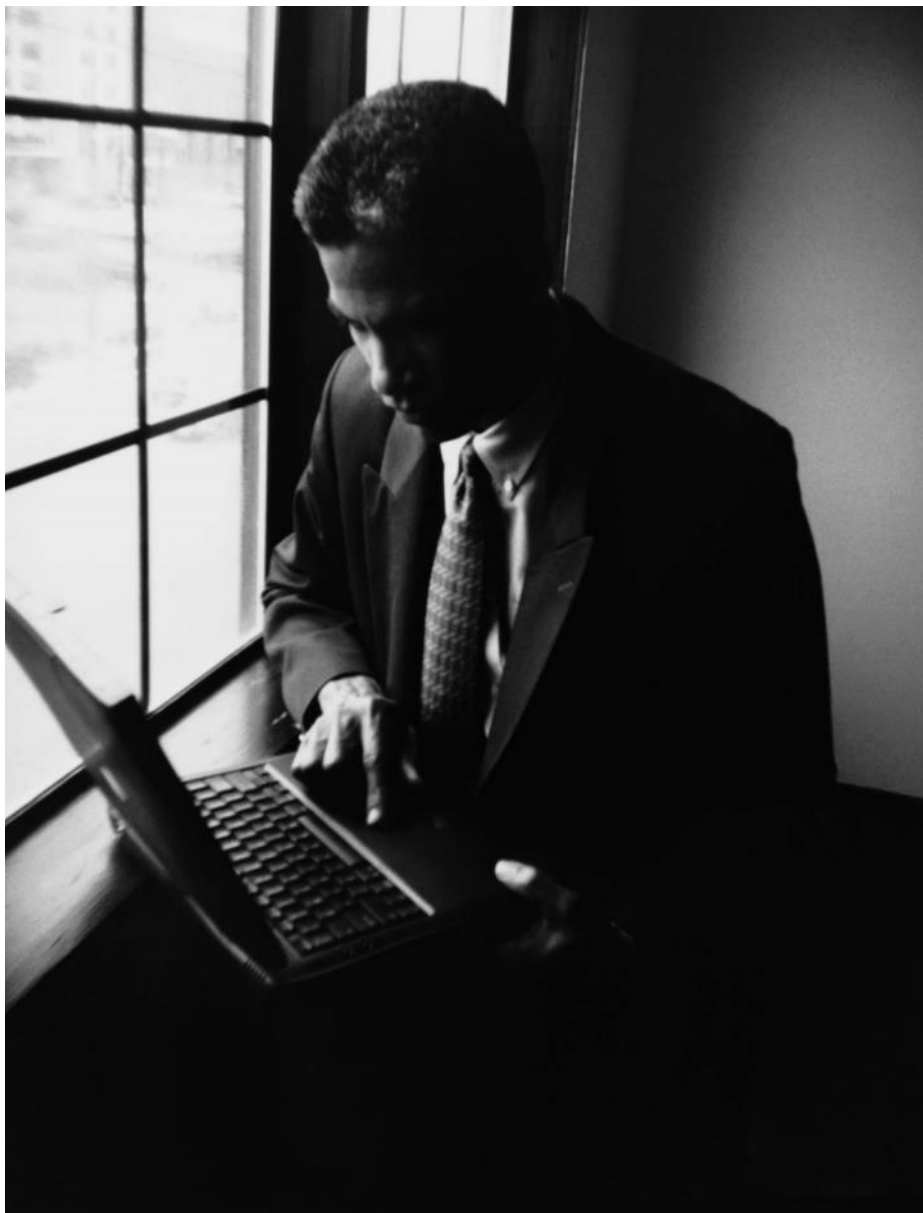
 ADDEPAR

 thinkorswim

 salesforce platform

 koyfin

PROBLEM



Product

TOOLS TAILORED TO ADVISOR NEEDS

Our product makes understanding your portfolio's efficiency easier, and no other product on the market offers the same niche focus.

TARGET AUDIENCE

Registered Investment Advisors

SALEABLE SOPHISTICATION

Some tools will be built entirely for any advisor to use easily. Others will require advisors to know basic programming skills for more sophisticated analysis.

MARKET WIDTH

Flexible

Opportunity to build
Fully customized tools, or
take
Advantage of existing tools

Research

Explore what is going on in
the
Market today, yesterday,
Tomorrow!

Design

Test out portfolios or
Compare your allocation to
Your Benchmarks

SEMESTER STRATEGY

FEB 2026

Source Quote Vendors and
Databases

APR 2026

Roll out First Test Runs of
Correlation Analysis
Applications and Tools

MAY 2026

Launch Website with
Applications Ready to be
Utilized by IARs

1 (-0.02%) NASDAQ:QQQ • 661.57⁰ +4.02 (+0.61%) NASDAQ:AAPL • 270.17⁰ -0.54 (-0.20%) NASDAQ:MSFT • 424.46⁰ -4.79 (-1.12%) NASDAQ:GOOGL • 349.94⁰ +0.16 (+0.05%) NASDAQ:NVDA • 209.25⁰ -3.92 (-1.84%) 17

[Track all markets on TradingView](#)

TRAJECTA

Sign in, register, or continue as a guest to manage your portfolio.

[Sign in](#) [Register](#) [Guest](#)

Email

you@example.com

Password

[Sign in](#)

Wins

TRAJECTA Account Data Input Analytics Reports

Portfolio data
Upload a CSV or enter holdings manually

Upload CSV
Browse... No file selected

Required columns: ticker, shares, purchase_price

Add holding manually

Ticker
AAPL

Shares
10

Purchase price
\$150.20

File Explorer window showing the upload process:

File name: **trajecta_portfolio_template**

Error: An error has occurred. Check your logs or contact the app author for clarification.

Imports



TRAJECTA Account Data Input Analytics Reports

Portfolio data: AAPL • 270.17 • -0.54 (-0.20%) NASDAQ:MSFT • 424.46 • -4.79 (-1.12%) NASDAQ:GOOGL • 349.94 • +0.16 (+0.05%) NASDAQ:NVDA • 209.25

Track all markets on TradingView

Reports

Generate a portfolio report. PDFs use static charts; HTML can embed a live TradingView overview.

Report title: Trajecta Portfolio Report

Format: ☒ HTML ☐ PDF

Include live TradingView overview (HTML only) ☒

Download report

Prepared for: Your name

Live preview

This live preview uses TradingView. The downloaded PDF will use static charts instead.

Apple Google Microsoft

Apple Inc. 270.17 USD -0.54 -0.20% 1 day

Track all markets on TradingView

Analytics

Numerical analytics computed locally; visual price charts from TradingView.

PORTFOLIO VALUE: \$14,896.66

CUMULATIVE RETURN: 21.0%

VOLATILITY (ANN.): 9.6%

SHARPE RATIO: 1.83

Allocation

ticker	shares	purchase_price	value	weight	cum_return	ann_vol
AAPL	10	\$150.20	\$1,800.77	12.09%	19.89%	19.30%
MSFT	5	\$290.10	\$2,349.49	15.77%	61.98%	19.75%
SPY	8	\$420.55	\$4,725.11	31.72%	40.44%	20.25%
APP	500	\$10.00	\$4,416.25	29.65%	-11.68%	18.82%
OWL	100	\$15.00	\$1,605.05	10.77%	7.00%	19.33%

Showing 1 to 5 of 5 entries

Previous 1 Next

Exports



Challenges

Per-holding mini charts

AAPL

10 sh



[Track all markets on TradingView](#)

MSFT

5 sh



[Track all markets on TradingView](#)

APP

500 sh



[Track all markets on TradingView](#)

OWL

100 sh



Invalid symbol

[Track all markets on TradingView](#)

MEET THE TEAM



Joseph Martinez
Founder



WALL ST
← 55

THANK YOU

Joseph Martinez

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