|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Stock | Quantity Shares | FMV | Annual Dividend | Beta | Tax Basis | Recent returns  2009 | Recent returns  2010 | Recent returns 2011 | Recent returns 2012 | Recent returns 2013 |
| A | 100 | 30,000 | 1.00 | 1.20 | 19,150 | 8 | 10 | 10 | 11 | 8 |
| B | 300 | 75,000 | 0.30 | 1.40 | 52,452 | 9 | 5 | (3) | 12 | 15 |
| C | 400 | 60,000 | 0.70 | 0.90 | 43,187 | 6 | 7 | 7 | 8 | 6 |
| D | 250 | 35,000 | 0.00 | 1.15 | 23,389 | 7 | 8 | 8 | 9 | 10 |
|  |  |  |  |  |  |  |  |  |  |  |

The coefficient of correlation between the market and the stock portfolio is 0.7% over the past 5 years. The market has yielded a geometric return of 6.8%

I'd like to see what the either the Sharpe Ratio is, or the Treynor Ratio. I'd like it in spreadsheet form as well. I'd also like to see which would be the best stock to sell...Do I look at recent returns or do I look at Tax basis and why?