

Risk-Adjusted Performance Evaluation

Date: [Insert Date]

To: [Advisor's Name]

From: [Your Name]

Subject: Risk-Adjusted Performance Metrics Review

Dear [Advisor's Name],

We appreciate your efforts in managing our investment portfolio. As part of our ongoing assessment, we are interested in reviewing the risk-adjusted performance metrics associated with our account. Below, please find a summary of the relevant metrics:

Performance Metrics

- **Sharpe Ratio:** [Insert Value]
- **Sortino Ratio:** [Insert Value]
- **Treynor Ratio:** [Insert Value]
- **Alpha:** [Insert Value]
- **Beta:** [Insert Value]

Comparative Analysis

In comparison to our benchmark (e.g., S&P 500), our portfolio has achieved the following:

- **Benchmark Sharpe Ratio:** [Insert Value]
- **Benchmark Sortino Ratio:** [Insert Value]

Conclusions

Based on the metrics above, we would like to discuss strategies for optimizing our risk-adjusted returns in our next meeting. Please confirm your availability for a discussion.

Thank you for your attention.

Sincerely,
[Your Name]
[Your Title]
[Your Company]