

performance

HISTORY from

6/15/ 2015 inception

	A	B	C	D	E	F	G	H	I
1	Our primary recommendation- BUY & HOLD: Quarterly invest Equal-Weight in 20 stocks with Growing Dividends.								
2									
3	Buy & Hold means: No selling is required or recommended. Only sell if you have a need to withdraw funds.								
4									
5	ROR: "Rate of Return" (after 3.3% commission expense at purchase)								
6	"Date" of approximately Every-3-mos Equal-Weight Investment in our site's then recommended 20 companies	For time period from 6/15/2015 to "Date" Total Return Average per Year On Cost Basis		"To-Date" Price ONLY Portfolio Yearly Average ROR On Cost Basis	"To-Date" Dividends' ONLY Portfolio Yearly Average ROR On Cost Basis	Total Companies in Portfolio	Companies purchased multiple times	Companies only purchased once	
7	3/11/2022	12.124%		10.245%	1.879%	126	87	39	
8	12/6/2021	14.770%		12.938%	1.832%	123	87	36	
9	9/21/2021	13.460%		11.606%	1.854%	121	86	35	
10	6/7/2021	15.892%		14.043%	1.849%	121	81	40	
11	3/8/2021	14.756%		12.869%	1.887%	118	78	40	
12	12/7/2020	12.723%		10.779%	1.944%	113	76	37	
13	9/8/2020	8.596%		6.551%	2.045%	111	74	37	
14	6/8/2020	10.008%		7.966%	2.042%	110	72	38	
15	3/16/2020	-2.561%		-4.902%	2.341%	107	69	38	
16	12/23/2019	13.324%		11.360%	1.964%	102	65	37	
17	9/9/2019	10.603%		8.560%	2.043%	101	64	37	
18	6/14/2019	9.872%		7.824%	2.048%	97	59	38	
19	3/5/2019	10.085%		8.017%	2.068%	92	56	36	
20	12/3/2018	11.162%		9.098%	2.064%	87	55	32	
21	9/4/2018	17.585%		15.515%	2.070%	82	54	28	
22	6/4/2018	17.869%		15.751%	2.118%	84	50	34	
23	3/5/2018	19.777%		17.614%	2.163%	79	45	34	
24	12/18/2017	24.338%		22.176%	2.162%	73	45	28	
25	9/18/2017	22.014%		19.760%	2.254%	73	42	31	
26	6/19/2017	22.118%		19.824%	2.294%	71	36	35	
27	3/20/2017	20.658%		18.327%	2.331%	63	31	32	
28	12/19/2016	21.474%		19.032%	2.442%	54	31	23	
29	10/10/2016	7.858%		5.798%	2.060%	51	28	23	
30	6/20/2016	7.907%		5.637%	2.270%	46	26	20	
31	3/21/2016	0.592%		-1.549%	2.141%	41	21	20	
32	12/21/2015	-10.212%		-12.245%	2.033%	32	18	14	

