

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	6/16/2022	7.633%	5.652%	1.981%	129	90	39		
8	3/11/2022	12.124%	10.245%	1.879%	126	87	39		
9	12/6/2021	14.770%	12.938%	1.832%	123	87	36		
10	9/21/2021	13.460%	11.606%	1.854%	121	86	35		
11	6/7/2021	15.892%	14.043%	1.849%	121	81	40		
12	3/8/2021	14.756%	12.869%	1.887%	118	78	40		
13	12/7/2020	12.723%	10.779%	1.944%	113	76	37		
14	9/8/2020	8.596%	6.551%	2.045%	111	74	37		
15	6/8/2020	10.008%	7.966%	2.042%	110	72	38		
16	3/16/2020	-2.561%	-4.902%	2.341%	107	69	38		
17	12/23/2019	13.324%	11.360%	1.964%	102	65	37		
18	9/9/2019	10.603%	8.560%	2.043%	101	64	37		
19	6/14/2019	9.872%	7.824%	2.048%	97	59	38		
20	3/5/2019	10.085%	8.017%	2.068%	92	56	36		
21	12/3/2018	11.162%	9.098%	2.064%	87	55	32		
22	9/4/2018	17.585%	15.515%	2.070%	82	54	28		
23	6/4/2018	17.869%	15.751%	2.118%	84	50	34		
24	3/5/2018	19.777%	17.614%	2.163%	79	45	34		
25	12/18/2017	24.338%	22.176%	2.162%	73	45	28		
26	9/18/2017	22.014%	19.760%	2.254%	73	42	31		
27	6/19/2017	22.118%	19.824%	2.294%	71	36	35		
28	3/20/2017	20.658%	18.327%	2.331%	63	31	32		
29	12/19/2016	21.474%	19.032%	2.442%	54	31	23		
30	10/10/2016	7.858%	5.798%	2.060%	51	28	23		
31	6/20/2016	7.907%	5.637%	2.270%	46	26	20		
32	3/21/2016	0.592%	-1.549%	2.141%	41	21	20		
33	12/21/2015	-10.212%	-12.245%	2.033%	32	18	14		
34	9/21/2015	-32.268%	-33.504%	1.236%	27	13	14		

