

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	1/2/2025	10.517%	8.641%	1.876%	174	111	63			
8	9/26/2024	12.669%	10.873%	1.796%	163	109	54			
9	7/1/2024	11.537%	9.696%	1.841%	162	106	56			
10	4/1/2024	12.426%	10.615%	1.811%	158	104	54			
11	12/29/2023	11.885%	10.063%	1.822%	152	101	51			
12	9/11/2023	10.233%	8.332%	1.901%	151	98	53			
13	6/30/2023	10.964%	9.105%	1.859%	146	94	52			
14	3/30/2023	9.676%	7.772%	1.904%	138	92	46			
15	12/12/2022	10.088%	8.186%	1.902%	131	92	39			
16	9/13/2022	9.316%	7.388%	1.928%	131	90	41			
17	6/16/2022	7.633%	5.652%	1.981%	129	90	39			
18	3/11/2022	12.124%	10.245%	1.879%	126	87	39			
19	12/6/2021	14.770%	12.938%	1.832%	123	87	36			
20	9/21/2021	13.460%	11.606%	1.854%	121	86	35			
21	6/7/2021	15.892%	14.043%	1.849%	121	81	40			
22	3/8/2021	14.756%	12.869%	1.887%	118	78	40			
23	12/7/2020	12.723%	10.779%	1.944%	113	76	37			
24	9/8/2020	8.596%	6.551%	2.045%	111	74	37			
25	6/8/2020	10.008%	7.966%	2.042%	110	72	38			
26	3/16/2020	-2.561%	-4.902%	2.341%	107	69	38			
27	12/23/2019	13.324%	11.360%	1.964%	102	65	37			
28	9/9/2019	10.603%	8.560%	2.043%	101	64	37			
29	6/14/2019	9.872%	7.824%	2.048%	97	59	38			
30	3/5/2019	10.085%	8.017%	2.068%	92	56	36			
31	12/3/2018	11.162%	9.098%	2.064%	87	55	32			
32	9/4/2018	17.585%	15.515%	2.070%	82	54	28			

