

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	7/1/2025	10.657%		8.786%	1.871%	184	120	64	
8	3/31/2025	9.472%		7.544%	1.928%	180	115	65	
9	1/2/2025	10.517%		8.641%	1.876%	174	111	63	
10	9/26/2024	12.669%		10.873%	1.796%	163	109	54	
11	7/1/2024	11.537%		9.696%	1.841%	162	106	56	
12	4/1/2024	12.426%		10.615%	1.811%	158	104	54	
13	12/29/2023	11.885%		10.063%	1.822%	152	101	51	
14	9/11/2023	10.233%		8.332%	1.901%	151	98	53	
15	6/30/2023	10.964%		9.105%	1.859%	146	94	52	
16	3/30/2023	9.676%		7.772%	1.904%	138	92	46	
17	12/12/2022	10.088%		8.186%	1.902%	131	92	39	
18	9/13/2022	9.316%		7.388%	1.928%	131	90	41	
19	6/16/2022	7.633%		5.652%	1.981%	129	90	39	
20	3/11/2022	12.124%		10.245%	1.879%	126	87	39	
21	12/6/2021	14.770%		12.938%	1.832%	123	87	36	
22	9/21/2021	13.460%		11.606%	1.854%	121	86	35	
23	6/7/2021	15.892%		14.043%	1.849%	121	81	40	
24	3/8/2021	14.756%		12.869%	1.887%	118	78	40	
25	12/7/2020	12.723%		10.779%	1.944%	113	76	37	
26	9/8/2020	8.596%		6.551%	2.045%	111	74	37	
27	6/8/2020	10.008%		7.966%	2.042%	110	72	38	
28	3/16/2020	-2.561%		-4.902%	2.341%	107	69	38	
29	12/23/2019	13.324%		11.360%	1.964%	102	65	37	
30	9/9/2019	10.603%		8.560%	2.043%	101	64	37	
31	6/14/2019	9.872%		7.824%	2.048%	97	59	38	
32	3/5/2019	10.085%		8.017%	2.068%	92	56	36	

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