

Sabrient Baker's Dozen Model Portfolio – 4th Quarter 2026

	Ticker	Company Name	Industry	Mkt Cap (\$B)	NTM EPS Growth	Fwd. PE	Fwd. PEG	Div. Yield	Notes
1	ALLY	Ally Financial Inc.	Consumer Finance	11.3	24.5%	6.6	0.27	3.2%	ALLY is a leading digital financial services company that offers comprehensive automotive financing products, consumer finance protection and insurance, digital banking and brokerage, high-yield savings, and wealth management. The company tightened its underwriting standards in 2023, which is having a positive impact on net charge offs (NCOs). Following its exit from mortgages and credit cards last year, ALLY refocused on its core auto lending business. Improved underwriting discipline, expanding net interest margins, and resilient consumer credit trends, all of which are expected to improve profitability over the coming years.
2	ALSN	Allison Transmission Holdings, Inc.	Construction Machinery and Heavy Transportation Equipment	9.1	28.9%	10.2	0.35	1.0%	ALSN is the largest manufacturer of fully automatic transmissions for medium and heavy duty commercial vehicles, as well as for defense applications. The company recently acquired Dana Inc.'s (DAN) Off-Highway business, broadening its portfolio into construction, mining, and agriculture. The acquisition creates a more diversified global mobility platform and nearly doubles the company's revenue. Allison's international On-Highway segment reached record sales as global automatic transmission adoption accelerates, especially in Europe. Defense revenue also continues to grow as global defense budgets expand, particularly in NATO countries and the Indo-Pacific.
3	EAT	Brinker International, Inc.	Restaurants	8.3	23.6%	14.9	0.63	0.0%	EAT owns, operates, and franchises casual restaurants under the Chili's Grill & Bar and Maggiano's Little Italy brands. As consumers are becoming increasingly price conscious, EAT is having success driving growth with its value-centric offerings. The company's "Better Than Fast Food" campaign has helped extend Chili's streak of 21 consecutive quarters of same-store sales growth for Chili's. EAT has worked diligently to streamline its operations, focus on core menu offerings, and reduce costs, allowing the company to better compete on price without sacrificing margin.
4	HALO	Halozyme Therapeutics, Inc.	Biotechnology	13.9	85.8%	12.3	0.14	0.0%	HALO is a biopharma technology company specializing in proprietary enzymes that enable delivery of injectable biologics, such as monoclonal antibodies and other therapeutic molecules, as well as small molecules and fluids. These therapies are used for the treatment of diseases, including HIV, MS, testosterone replacement therapy, breast cancer, leukemia, rheumatoid arthritis, and tumors. The company's growth is largely attributable to three of its partnership products hitting blockbuster status: J&J's DARZALEX, Roche's Phesgo, and Argenx's VYVGART. HALO's partners have been making advancements and have received FDA approvals, which are expected to drive royalty revenue for the company going forward.
5	HPE	Hewlett Packard Enterprise Company	Technology Hardware, Storage and Peripherals	74.2	46.7%	12.0	0.26	1.0%	HPE is a global enterprise technology company offering servers, storage, hybrid-cloud, and AI infrastructure. The company is a major beneficiary of the AI data center buildout as demand for AI servers accelerates. The company has seen strong server order growth as enterprises and sovereign customers race to deploy AI inferencing and agentic-AI workloads, often on-premises. HPE's acquisition of Juniper has allowed the company to double its networking business, which offers higher margins than the server segment. The company is expected to benefit from the continuing powerful wave of AI server demand.
6	MPC	Marathon Petroleum Corporation	Oil and Gas Refining and Marketing	133.0	193.0%	6.1	0.03	0.8%	MPC is an integrated downstream energy company engaging in refining, marketing, and transportation of petroleum products, natural gas, and renewable diesel. Diesel inventories are at multi year lows, due in part to global supply disruptions that have created a tight refined-products market and led to improved crack spreads. Crack spreads are expected to remain elevated through 2027, even if geopolitical issues ease, as restocking of depleted strategic petroleum reserves becomes a priority and repairing of damaged Gulf and Russian capacity will take time. The company is also seeing growth in jet fuel demand as air travel continues to increase. Increased construction activity is expected to boost demand for fuel over the long term. As a transporter of natural gas through its Midstream segment, MPC is also well positioned to benefit from the growing global demand for LNG, based on the expected rise of U.S. exports and natural gas-powered electricity over the next year.
7	ON	ON Semiconductor Corporation	Semiconductors	28.5	47.2%	18.7	0.40	0.0%	ON is a designer and manufacturer of power and intelligent sensing semiconductors used in automotive, industrial, and AI data centers. AI scaling is increasingly limited by power delivery, and ON helps solve part of the bottleneck. The company sells the power stages, SiC and silicon MOSFETs, and controllers used from the grid through the rack to the processor. ON is expected to double its data center revenue over the next year as demand for AI computing continues to rise. The company is also making a push into robotics and physical AI with its intelligent-sensing technology.
8	OSK	Oshkosh Corporation	Construction Machinery and Heavy Transportation Equipment	7.9	39.4%	10.0	0.25	1.8%	OSK is a specialty vehicle manufacturer that provides purpose-built equipment, including aerial work platforms for construction, tactical vehicles for defense, and commercial firefighting equipment. Large-scale construction projects and data center buildouts are driving demand for OSK's construction equipment and are expected to drive growth for the company over the long term. The company is also seeing growing sales [maybe "increased sales"] for firetrucks, leading to a multi-year backlog. OSK is also ramping up production of its next-generation delivery vehicles (NGDV) for the USPS.

	Ticker	Company Name	Industry	Mkt Cap (\$B)	NTM EPS Growth	Fwd. PE	Fwd. PEG	Div. Yield	Notes
9	PAYC	Paycom Software, Inc.	Human Resource and Employment Services	11.2	27.3%	19.3	0.71	0.6%	PAYC provides cloud-based payroll and human capital management software to U.S. employers. The company is incorporating AI into its products with the launch of its IWant platform, which is an AI command engine that lets users get data and complete tasks without the need to navigate complicated HR software interfaces. The IWant platform has become the primary way new employees interact with the system. PAYC is also utilizing AI internally as much as in its products, allowing the company to increase automation, reduce head count, and increase margins over the last year. The company is investing in its own data centers to host AI models, a move that is expected to save the company on R&D and reduce fees to third-party AI providers.
10	PLMR	Palomar Holdings, Inc.	Property and Casualty Insurance	3.6	22.9%	12.6	0.55	1.3%	PLMR is a specialty insurance provider that offers property and casualty products, including earthquake inland marine, Hawaii hurricane, and flood insurance. The company uses a data-driven and technology-enabled underwriting and pricing strategy that drives efficiency, improves risk selections, and reduces operational costs. The company is leaning heavily into AI with the launch of its new PLMR.Farm platform that is streamlining its crop insurance operations. PLMR has grown its gross written premiums consistently and has a return on equity above 20%, one of the best in the industry.
11	STLD	Steel Dynamics, Inc.	Steel	35.1	100.7%	11.1	0.11	0.9%	STLD is one of the largest and most efficient steel producers and metals recyclers in North America. The company's electric-arc-furnace (EAF) model uses recycled scrap, allowing the company to be vertically integrated and achieve higher utilization of its steel mills. The company is seeing strong demand, particularly in non-residential construction. The demand is being led by AI data center construction, manufacturing onshoring, and energy projects. STLD is ramping up its new aluminum operations, which are expected to provide additional long-term growth while further diversifying the revenue base. The company has a structural cost advantage due to its EAF model, which drives higher margins and allows STLD to better compete as higher energy prices impact the industry.
12	STX	Seagate Technology Holdings plc	Technology Hardware, Storage and Peripherals	150.3	136.5%	18.0	0.13	0.5%	STX is a leading pure-play hard disk drive (HDD) manufacturer, with a focus on mass capacity storage solutions for cloud data centers. The global artificial intelligence infrastructure buildout is driving exponential demand for cost-effective mass storage. STX's Mozaic platform, which utilizes heat-assisted magnetic recoding (HAMR) technology, enables the company to pack more data capacity into the same physical drive footprint, thereby reducing cost per terabyte and expanding margins. Generative and agentic AI systems have increased data storage requirements that are better served by HDDs due to its cost- per-terabyte advantage.
13	TSM	Taiwan Semiconductor Manufacturing Company Limited	Semiconductors	1931.6	43.2%	18.9	0.44	0.0%	TSM is a semiconductor manufacturer with a variety of end market applications, including high performance computing, smartphones, Internet of things (IoT), and automotive. It is the world's first and most dominant dedicated chip foundry. The company is experiencing strong demand for its leading edge 3nm and 5nm technologies that are critical for advanced computing and AI applications. The increasing demand for energy-efficient computing presents a significant growth opportunity. To mitigate geopolitical risks and diversify its supply chain, TSM is expanding its global operations to increase production capacity, tap into new markets, and manufacture closer to the customer. This includes investing heavily in the US and Japan.

Sabrient®

	Mkt Cap (\$B)	NTM EPS Growth	Fwd. PE	Fwd. PEG	Div. Yield
Average:	186.0	63.1%	13.1	0.21	0.9%
Median:	13.9	43.2%	12.3	0.28	0.8%

DEFINITIONS:

NTM EPS Growth = Next 12 months earnings per share year-over-year expected growth rate, based on consensus of sell-side analysts as reported by S&P Capital IQ

Fwd. PE = Forward (or expected) Price/Earnings ratio, based on consensus of sell-side analysts' earnings per share estimates for the next 12 months as reported by S&P Capital IQ

Fwd. PEG = Fwd. PE divided by NTM EPS Growth rate (i.e., Ratio of Forward P/E to Forward Growth)

Numbers shown were calculated using data as of market close on 10/19/2026.

Sabrient Systems, LLC ("SABRIENT") defines its approach to stock selection as a quantitative GARP model (Growth At a Reasonable Price) with a qualitative fundamental emphasis and forensic accounting review.

Disclaimers:

The information contained herein is based on sources believed to be reliable, but no warranty or representation of any kind, expressed or implied, is made as to its accuracy, completeness, or correctness. This document is neither a solicitation to buy nor an offer to sell securities, nor is it intended as personalized investment advice. Information contained herein reflects our judgment or interpretation at the time of publication and is subject to change without notice.

The Notes above reflect the opinions of SABRIENT and include forward-looking statements subject to a number of uncertainties that could cause actual results to differ materially from the statements made.

Investing involves risk and past performance is no guarantee of future results. Investment returns will fluctuate and principal value may either rise or fall.

© Copyright 2026 by Sabrient Systems LLC. Unauthorized reproduction or redistribution of this document in full or in part is strictly prohibited by law and a violation of the Copyright Act.

Information contained herein may not be reproduced in whole or in part, including photocopying or e-mail forwarding, without the express written consent of SABRIENT.