Sabrient®

Sabrient leverages a process-driven methodology to build robust quantitative models and produce actionable equity research, investor tools, stock & ETF rankings, derived data sets, stock portfolios, and rules-based indexes that seek to outperform market benchmarks.

Portfolio Update and Market Outlook

Baker's Dozen – Dividend – Small Cap Growth – Forward Looking Value

1. ***Q2 2026 Baker's Dozen Portfolio** — detailed overview of our flagship alpha-seeking portfolio*
2. ***Small Cap Growth 51** — offers alpha-seeking potential for a broadening market*
3. ***Dividend 56** — offers bond-like income with capital appreciation potential*
4. ***Summary talking points** — for advisors and investors*
5. ***Performance update** — including long-term chart of the Baker's Dozen Annual Model Portfolio*
6. ***Market observations & outlook***
7. ***Sabrient Scorecard Subscription** – plus our founder's new book: "Moon Rocks to Power Stocks"*

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Updated 7/1/2026

Summary Talking Points

1. The **Baker's Dozen Annual Model Portfolio** launched January 2009 (near bottom of Global Financial Crisis). Over the full 17½ years through 6/30, it shows an average annual gross total return of **+22.1%** vs. +14.9% for SPY (Slide 4).
2. Our suite of portfolios includes quarterly **Baker's Dozen, Dividend, and Small Cap Growth**, and annual **Forward Looking Value**. Of our most recent portfolios, **33 of 39 (85%)** have outperformed or stayed close to their benchmarks (gross total return) (Slide 6).
3. **Q2 2026 Baker's Dozen** launched 4/17 with 13 concentrated positions with 5/8 large/mid-cap split and 9/4 Growth/Value split (Slide 5). It is designed to offer the potential for outsized gains—for example, Q1 2025 Baker's Dozen returned **+46.7%** vs. +20.3% for SPY, next-to-terminate Q2 2025 is up **+59.4%** vs. +43.9% for SPY, and Q1 2026 is up **+29.8%** vs. +10.8% for SPY (gross total returns as of 6/30). *The next **Q3 2026** portfolio launches 7/20.*
4. **Small Cap Growth 51** just launched 6/17. It provides an alpha-seeking alternative to a passive position in the Russell 2000 Index for small-cap exposure in anticipation of improving market breadth. The next-to-terminate SCG 46 is up **+84.1%** vs. +54.4% for SLYG.
5. **Dividend 56** launched 5/6 and displays a **current yield of 3.20%** (as of 6/30). It employs a Growth & Income strategy with bond-like yield while seeking capital appreciation from high-quality companies with solid earnings growth. All 8 live portfolios are beating the S&P 500 High-Dividend (SPYD) benchmark.
6. The annual **Forward Looking Value 13** launched 8/15/25 with a small/mid-cap bias. It is a less-concentrated and more value-oriented version of Baker's Dozen and offers an alpha-seeking alternative to a passive position in S&P 500 Value Index. It is in secondary market and closed to new investors.
7. The **First Trust Long-Short ETF (FTLS)** is an actively managed, low-beta portfolio that licenses as a quality prescreen Sabrient's Earnings Quality Rank (EQR), an accounting-based risk assessment signal used in all our portfolio strategies. The fund now has **$2.4 billion** in AUM.
8. Our **Sector Rotation Model** Portfolio continues to display a bullish bias and suggests holding Technology, Industrials, and Basic Materials (Slide 8).
9. Uncertainties persist with Iran, oil prices, supply chains, trade deals & tariffs, Ukraine, federal debt, civil strife, midterm elections, socialist creep, Fed policy, inflation, and jobs market. But **fundamental tailwinds still outweigh headwinds**, in our view, given AI optimism, robust capex, deregulation, lower taxes, re-privatization, re-industrialization, rising productivity/margins/earnings, and resumed disinflationary trends (Slides 9-10).
10. Rather than the passive cap-weighted indexes dominated by Big Tech, **investors may be better served by active stock selection** that seeks under-the-radar and undervalued gems primed for explosive growth. *This is what Sabrient aims to do in our various portfolios*, all of which provide exposure to Value, Quality, Growth, and Size factors and to both secular and cyclical growth trends.
11. Sabrient leverages a **process-driven methodology** to build fundamentals-based multifactor models and a "quantamental" selection approach (Slides 11-12). You can access our models with Sabrient Scorecards and download founder David Brown's new book at ***Moon Rocks to Power Stocks*** (slide 13).

Sabrient Portfolios: leveraging our "quantamental" approach

- **Q2 2026 Baker's Dozen** (quarterly, 13 stocks) launched 4/17
  - ⇒ *Our flagship product is a concentrated, all-cap, alpha-seeking portfolio*
  - ⇒ *Balances value and cyclical growth with high-quality (not speculative) secular growers*
  - ⇒ ***The next Q3 2026 portfolio launches on 7/20****.*
- **Small Cap Growth 51** (quarterly, 43 stocks) launched 6/17
  - ⇒ *Alpha-seeking alternative to the passive Russell 2000 for small cap exposure*
  - ⇒ *May benefit from improving market breadth and mean reversion of Small vs. Large cap*
- **Dividend 56** (quarterly, 46 stocks) launched 5/6
  - ⇒ *High-quality GARP + Income portfolio; bond-proxy income with capital appreciation*
  - ⇒ *Current Yield of* ***3.24%*** *on NAV as of 6/15*
- **Forward Looking Value 13** (annual, 28 stocks) launched 8/15/2025
  - ⇒ *Less-concentrated and more value-oriented version of the Baker's Dozen*
  - ⇒ *May benefit from improving market breadth and mean reversion of Value vs. Growth*

Sabrient Baker's Dozen Annual Model Portfolio (reconstituted each January)

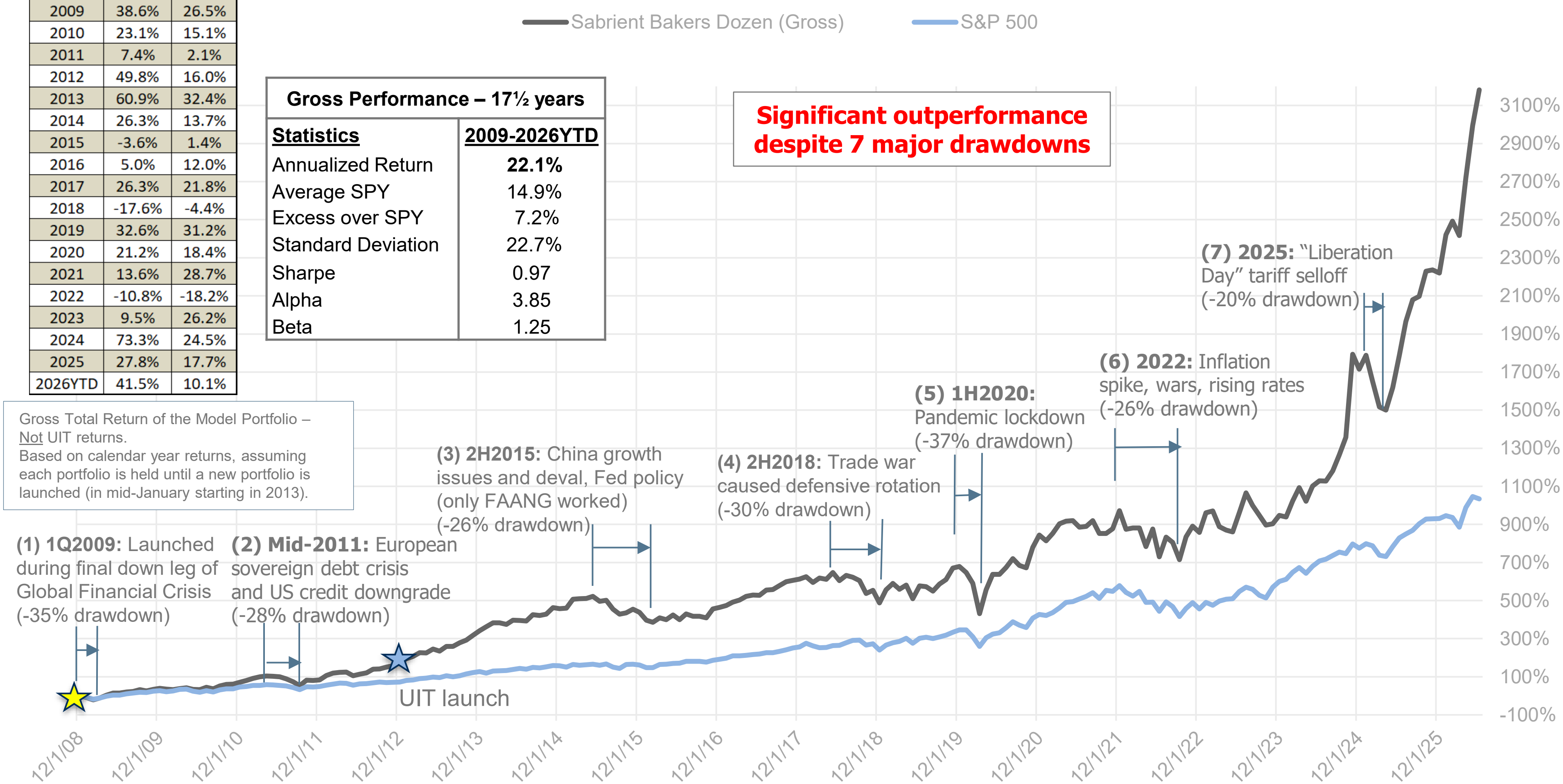
(17½ years: 1/1/2009 inception thru 6/30/2026, end-of-month data points, updated quarterly)

Year	Portfolio	SPY
2009	38.6%	26.5%
2010	23.1%	15.1%
2011	7.4%	2.1%
2012	49.8%	16.0%
2013	60.9%	32.4%
2014	26.3%	13.7%
2015	-3.6%	1.4%
2016	5.0%	12.0%
2017	26.3%	21.8%
2018	-17.6%	-4.4%
2019	32.6%	31.2%
2020	21.2%	18.4%
2021	13.6%	28.7%
2022	-10.8%	-18.2%
2023	9.5%	26.2%
2024	73.3%	24.5%
2025	27.8%	17.7%
2026YTD	41.5%	10.1%

Gross Performance – 17½ years

Statistics	**2009-2026YTD**
Annualized Return	**22.1%**
Average SPY	14.9%
Excess over SPY	7.2%
Standard Deviation	22.7%
Sharpe	0.97
Alpha	3.85
Beta	1.25

Gross Total Return of the Model Portfolio – Not UIT returns.
Based on calendar year returns, assuming each portfolio is held until a new portfolio is launched (in mid-January starting in 2013).



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Graph shows gross total return (reinvesting dividends) of the annual January *Baker's Dozen* model portfolios as an annually rebalanced compounded portfolio versus the benchmark S&P 500 Index. Sabrient is not responsible for the usage of such portfolios by any third party, including without limitation the UITs sponsored by First Trust. In addition, the performance numbers herein do not reflect the deduction of brokerage commissions, execution fees, or other expenses that may be paid by any third party making its own investment in the portfolios. First Trust UITs are subject to the imposition of fees, and to variation in the construction of the portfolios, which over time will reduce the performance of such UITs in comparison with the performance of Sabrient's model portfolios. Past performance is not a guarantee or indication of future results.

Latest *Q2 2026 Baker's Dozen* Portfolio – statistics upon launch

Launch date: 4/17/2026

Ticker	Company Name	Sector	Industry	Mkt Cap ($B)	NTM EPS Growth	Fwd PE	Fwd PEG	Div Yield	EQR	GQR
ABBV	AbbVie	Health Care	Biotechnology	371.9	43.5%	14.7	0.34	3.3%	4	7
ALLY	Ally Financial	Financials	Consumer Finance	13.2	36.5%	8.2	0.22	2.8%	4	7
ALSN	Allison Transmission	Industrials	Construction Machinery & Equipment	10.7	18.9%	14.1	0.75	0.8%	4	9
AVGO	Broadcom	Information Technology	Semiconductors	1,802.9	84.8%	28.3	0.33	0.7%	5	8
CHWY	Chewy	Consumer Discretionary	Other Specialty Retail	10.8	27.5%	16.0	0.58	0.0%	4	10
DY	Dycom Industries	Industrials	Construction and Engineering	11.8	31.3%	27.6	0.88	0.0%	5	10
HBM	Hudbay Minerals	Materials	Diversified Metals and Mining	10.0	160.3%	14.2	0.09	0.0%	5	6
LNG	Cheniere Energy	Energy	Oil & Gas Storage and Transportation	54.6	52.0%	15.8	0.30	0.9%	5	5
PNFP	Pinnacle Financial Partners	Financials	Regional Banks	14.1	22.0%	9.1	0.42	2.1%	4	7
ROKU	Roku	Communication Services	Movies and Entertainment	15.7	267.8%	50.8	0.19	0.0%	5	10
SARO	StandardAero	Industrials	Aerospace and Defense	9.2	39.4%	19.8	0.50	0.0%	4	8
STX	Seagate Technology	Information Technology	Tech Hardware, Storage, Peripherals	119.5	63.5%	32.0	0.50	0.6%	3	10
TSM	Taiwan Semiconductor	Information Technology	Semiconductors	1,687.8	35.1%	23.6	0.67	0.0%	4	10
			Average:	317.8	67.9%	21.1	0.31	0.9%	4.3	8.2

Notes:

- Diverse, mid-cap-biased, with Large/Mid/Small cap mix of 5/8/0
- Growth bias with 9 Growth and 4 Value stocks
- A balance of *secular* growth, *non-cyclicals,* and *cyclical* stocks across 8 business sectors

EQR has quintile scale of 1-5 (5 is best)
GQR has decile scale of 1-10 (10 is best)

Performance of live and recently terminated portfolios – as of 6/30/2026

Baker's Dozen - Gross return thru: 6/30/2026

Portfolio	Launch	Close	Gross Return (FTP website)	SPY Return	Active Return
Q4 2023 BD	10/20/23	1/21/25	46.2%	45.6%	0.6%
Q1 2024 BD	1/19/24	4/21/25	45.7%	8.2%	37.5%
Q2 2024 BD	4/19/24	7/21/25	18.9%	29.0%	-10.1%
Q3 2024 BD	7/19/24	10/20/25	41.7%	24.1%	17.6%
Q4 2024 BD	10/18/24	1/20/26	27.8%	17.7%	10.1%
Q1 2025 BD	1/17/25	4/20/26	46.7%	20.3%	26.4%
Q2 2025 BD	4/17/25		59.4%	43.9%	15.5%
Q3 2025 BD	7/18/25		34.8%	20.3%	14.4%
Q4 2025 BD	10/17/25		6.0%	13.3%	-7.3%
Q1 2026 BD	1/20/26		29.8%	10.8%	19.0%
Q2 2026 BD	4/17/26		9.5%	5.4%	4.1%

The tables show gross total returns (without transactional sales charge, as displayed on the ftportfolios.com website) versus a relevant benchmark for all the live portfolios plus some that recently terminated.

S&P 500 Value (SPYV) is the benchmark for Forward Looking Value, S&P 500 High Dividend (SPYD) is the benchmark for Dividend portfolios, and S&P 600 Small Cap Growth (SLYG) is the benchmark for Small Cap Growth.

The vast majority (**71%**) of portfolios created since major process enhancements were implemented in December 2019 have either outperformed or stayed close to their benchmarks, and we have continued to enhance with Monte Carlo analysis and AI tools. To wit, **33 of the 39 most recent portfolios (85%)** shown on this slide across all themes have outperformed or stayed close to their benchmarks.

To illustrate the **outperformance potential**, Q1 2024 Baker's Dozen finished **+45.7%** vs. +8.2% for SPY, Q3 2024 Baker's Dozen finished **+41.7%** vs. +24.1% for SPY, Q1 2025 Baker's Dozen finished **+46.7%** vs. +20.3% for SPY, next-to-terminate Q2 2025 is up **+59.4%** vs. +43.9% for SPY, Q1 2026 is up **+29.8%** vs. +10.8% for SPY, and SCG 46 is up **+84.1%** vs. +54.4% for SLYG.

Forward Looking Value - Gross return thru 6/30/2026

Portfolio	Launch	Close	Gross Return	SPYV Return	Active
FLV 10	7/15/22	10/24/23	24.0%	12.4%	11.6%
FLV 11	7/24/23	11/4/24	20.8%	20.3%	0.6%
FLV 12	7/31/24	11/10/25	19.9%	12.7%	7.2%
FLV 13	8/15/25		23.0%	14.5%	8.4%

Sabrient Dividend - Gross return thru: 6/30/2026

Portfolio	Launch	Close	Gross Return	SPYD Return	Active
Div 44	6/5/23	6/5/25	35.4%	27.9%	7.4%
Div 45	9/1/23	9/2/25	30.6%	30.7%	-0.1%
Div 46	11/29/23	12/1/25	30.6%	31.4%	-0.8%
Div 47	2/26/24	2/26/26	44.5%	36.9%	7.6%
Div 48	5/23/24	5/22/26	58.3%	30.0%	28.4%
Div 49	8/19/24		49.2%	18.9%	30.3%
Div 50	11/15/24		30.1%	13.2%	16.8%
Div 51	2/11/25		35.1%	15.9%	19.2%
Div 52	5/10/25		45.9%	19.7%	26.2%
Div 53	8/8/25		39.6%	15.8%	23.7%
Div 54	11/6/25		18.7%	16.9%	1.8%
Div 55	2/5/26		8.9%	5.1%	3.8%
Div 56	5/6/26		4.5%	2.7%	1.8%

Small Cap Growth - Gross return thru: 6/30/2026

Portfolio	Launch	Close	Gross Return	SLYG Return	Active
SCG 40	11/3/23	2/3/25	29.8%	29.2%	0.6%
SCG 41	2/1/24	5/1/25	3.3%	0.3%	3.0%
SCG 42	5/1/24	8/1/25	7.5%	6.7%	0.8%
SCG 43	7/29/24	10/29/25	-3.9%	2.3%	-6.2%
SCG 44	10/25/24	1/26/26	8.9%	11.9%	-3.0%
SCG 45	1/22/25	4/22/26	11.8%	14.5%	-2.7%
SCG 46	4/22/25		84.1%	54.4%	29.7%
SCG 47	7/16/25		42.9%	33.4%	9.5%
SCG 48	10/3/25		27.5%	26.2%	1.3%
SCG 49	12/19/25		13.2%	24.1%	-11.0%
SCG 50	3/19/26		24.3%	24.1%	0.2%

Top performers in recent Baker's Dozen portfolios

Sabrient's models often uncover high-quality, undervalued, under-the-radar names. In fact, many of the top performers in our recent Baker's Dozen portfolios might not have been on your bingo card at the time (terminated portfolios shown in dark blue, live portfolios shown in green (as of 6/30):

Q1 2024: AppLovin (APP) +455%

Q2 2024: NVIDIA (NVDA) +125%

Q3 2024: Carpenter Technology (CRS) +103%

Q4 2024: Seagate Technology (STX) +191%

Q1 2025: Comfort Systems (FIX) +224%

Q2 2025: Sterling Infrastructure (STRL) +498%

Q3 2025: Sterling Infrastructure (STRL) +235%

Q4 2025: Flowserve (FLS) +47%

Q1 2026: Western Digital (WDC) +187%

Q2 2026: Seagate Technology (STX) +76%

SectorCast Rankings and Sector Rotation Model

Sabrient SectorCast Sector Rotation Strategy - As of 6/30/2026 Suggested Top 3 Sector ETFs for Bullish, Neutral, or Defensive Outlooks Bullish/Neutral/Defensive bias based on SPY vs. 50/200 day moving averages; 30-90-day forward look							
Sector	**ETF**	**Outlook Score**	**Bull Score**	**Bear Score**	**Net Score: Neutral Bias**	**Net Score: Bullish Bias**	**Net Score: Defensive Bias**
TECHNOLOGY	IYW	97	65	42	97	90.0	54.8
FINANCIALS	IYF	53	46	59	53	54.6	76.9
TELECOMMUNICATIONS	IYZ	49	46	48	49	53.3	49.6
ENERGY	IYE	45	24	66	45	27.6	90.0
INDUSTRIALS	IYJ	36	55	49	36	59.1	46.7
BASIC MATERIALS	IYM	36	52	42	36	55.8	30.4
HEALTHCARE	IYH	33	39	62	33	40.4	75.9
CONSUMER DISCRETIONARY	IYC	27	52	54	27	52.8	54.8
CONSUMER STAPLES	IYK	13	39	65	13	33.9	74.9
UTILITIES	IDU	10	38	60	10	31.8	62.0
Sabrient's ***Outlook Score*** employs a forward-looking fundamentals-based scoring algorithm to create a composite profile of the constituent stocks. ***Bull Score*** and ***Bear Score*** are based on price behavior of the underlying stocks on particularly strong and weak days over the prior 40 market days. High Bull indicates a tendency for relative strength in a strong market, and high Bear indicates a tendency for relative strength in a weak market (i.e., safe havens). High for all scores is 100, and higher is better.							

Our SectorCast rankings reflect a **bullish bias** as cyclicals and secular growth sectors dominate the top 7 spots, with defensive Utilities and Staples at the bottom. The main cautions are the many Outlook scores below 50 and the low score for Consumer Discretionary. Earnings growth, margins, and productivity have been stellar, with rising forward guidance. Blended EPS growth across sectors was +28% in Q1, and revenue growth +11%. Profit margins were 15%, led by Tech at 29%. Investors are looking beyond the ongoing Iran conflict and its impacts on shipping, energy, supply chains, and inflation. Technology remains firmly at the top despite a high valuation as investors are willing to pay up for strong growth and margins, increasingly reflecting AI becoming deeply embedded in business operations in a long-term secular investment cycle rather than just a short-term cyclical trend.

The market has been strong despite the many macro uncertainties, concerns of an AI bubble, Fed hawkishness on inflation, stagnant jobs growth, and poor consumer sentiment. But investor optimism persists about fiscal stimulus (tax cuts and deregulation as the OBBBA fully kicks in), rising productivity, and solid earnings growth forecasts, despite the event-driven surge in oil prices (already falling), inflation, and interest rates.

Technology still displays the highest forward P/E of 28.6x, which is down slightly versus recent levels when it was approaching 31x level of several months back. It remains atop the rankings due to rising EPS growth estimates (now at +29.4%), strongly positive sell-side analyst EPS revisions, a modest forward PEG ratio of 0.97 (as price recedes while EPS estimates rise), and by far the highest profit margins, return ratios, and insider buying.

Our **Sector Rotation Model Portfolio** switched from a defensive to **bullish bias** when the S&P 500 leapt above both its 50-day and 200-day moving averages in early April, and it has remained such. The model suggests holding **Technology (IYW), Industrials (IYJ),** and **Basic Materials (IYM)**.

Market Observations & Outlook - 1/2

1. S&P 500 (SPY) continues to linger **near its highs** on AI and Iran optimism and robust corporate earnings. The VIX remains subdued, bond credit spreads are near all-time lows, and oil price is back below $70/bbl. Notably, **leadership has been expanding**, with the Dow Jones Industrials (DIA) and small-cap Russell 2000 (IWM) surging to new highs. Forward P/E on cap-weight S&P 500 (SPY) is down slightly to 21.4x, while equal-weight S&P 500 (RSP) and S&P 600 small-cap (SPSM) have risen slightly to 17.3x and 16.0x.

2. Still, **uncertainty persists** with Iran, oil and fertilizer prices, but also ongoing trade deals/tariffs, Ukraine/Russia, Cuba, federal debt, civil strife, political polarization, midterm elections (and socialist creep), Fed policy, inflation, stagnant jobs, consumer distress, and low global liquidity growth. However, the One Big Beautiful Bill Act (OBBBA) has fully kicked in with its pro-growth policies, and valuations are reasonable—given **rising corporate earnings forecasts** (now +23% YoY for CY2026) as the private sector retakes its rightful place as the primary engine of growth, with much more efficient capital allocation and ROI than government. Also, besides the oil price spike, **disinflationary trends have resumed**, including the secular implementation of AI and automation, rising productivity, falling shelter costs, a stable dollar, slow M2 growth, and the deflationary impulse from a struggling China.

3. We still believe **fundamental tailwinds outweigh headwinds**, and indeed investors are positioning for continued AI progress, robust capex for AI, reshoring, and re-industrialization, looser Fed monetary policy, resurgence in global liquidity growth, and OBBBA policies including tax and interest rate cuts, deregulation, smaller government, and re-privatization. This should continue to attract foreign direct investment (FDI) into the US, cut the debt and deficit-to-GDP ratio, and **unleash organic private sector growth**, with stock valuations driven by rising earnings and ROI rather than AI hope-driven multiple expansion.

Market Observations & Outlook - 2/2

4. A fed funds neutral rate of 3.0% seems right for a healthy economy, but due to inflation spike, fed funds futures give 0% odds of a rate cut in 2026—but 86% chance of at least one rate *hike* by January. However, **high interest rates hurt the struggling parts of our K-shaped economy**. Yields remain elevated, with the 10-year around 4.5%, but the economy needs lower interest rates plus business-friendly fiscal policy to: a) sustain rising global liquidity, b) relieve indebted consumers and businesses, c) support US and global economies, and d) avert global credit crisis.

5. At the core of an equity portfolio still should be US Big Tech stocks, given their entrepreneurial culture, disruptive innovation, wide moats, global scalability, huge cash stores, resilient and durable earnings growth, and world-leading margins, ROI, and free cash flow. But a **broadening market suggest consideration of other opportunities** in AI infrastructure (including power/energy) as well as small/mid caps, value, quality, cyclicals, equal-weight indexes, and sectors like industrials, financials, materials, and healthcare, plus dividend stocks and bitcoin. Also, investors might consider hard asset plays like oil, agriculture, commodities, industrial metals, uranium, rare earths, land, miners, 3D printing, and engineering & construction firms/equipment.

6. Thus, rather than the passive cap-weighted indexes, investors may be **better served by active stock selection** that seeks to identify under-the-radar, undervalued, high-quality gems primed for explosive growth. **This is what Sabrient seeks to do in our various portfolios**, all of which provide exposure to Value, Quality, Growth, and Size factors and to both secular and cyclical growth trends.

=> ***All this is discussed in detail in our "Sector Detector" market commentaries at Sabrient.com.***

Company Overview

- **Sabrient Systems LLC:**
  - Independent equity research provider and registered investment advisor (RIA) founded in 2000
  - Quantitative fundamentals-based multifactor models created by:
    - ✓ team of engineers and analysts led by founder David Brown, a former **NASA** engineer on the Apollo 11 moon landing project, and CEO Scott Martindale, a former **Chevron** engineer
    - ✓ team of forensic accounting specialists from Gradient Analytics, a wholly owned Sabrient subsidiary
  - Process-driven, bottom-up methodology leveraging a scientific hypothesis-testing approach to model development
  - Unlike most RIAs, we don't manage investor money directly but instead receive licensing/consulting fees

- **Products & Services:**
  - Quantitative equity research, models and data sets, rankings of stocks & ETFs, online investor tools, and insightful market commentaries
  - Portfolio strategies for various investing styles, stock portfolios for UITs and SMAs, rules-based equity indexes for ETFs
  - Best known for our ***Baker's Dozen*** franchise, a 13-stock portfolio first introduced in 2009 based on a proprietary Growth at a Reasonable Price (GARP) "quantamental" approach
  - Baker's Dozen and 3 other offshoot strategies offered as **UITs through First Trust Portfolios**
  - 8 core proprietary multi-factor models, including the ***Earnings Quality Rank (EQR)***, an accounting-based risk signal designed by subsidiary Gradient Analytics and used internally for Sabrient portfolios. It is also licensed to hedge funds and to the ***First Trust Long-Short ETF (FTLS)***.

What We Do: Our Active "Quantamental" Approach

1. **Quantitative screen** to narrow large eligible universe (50-100 names)

Forward P/E, forward EPS growth, recent dynamics of analyst consensus estimates, earnings quality (based on expertise of subsidiary Gradient Analytics), consistency & reliability of earnings growth

2. **Fundamental analysis** to identify top candidates (approx. 25 names)

Still mostly numbers-driven but not algorithmic. We also review recent news reports, long & short theses from Wall Street, and Canary Data for fundamental risk assessment.

3. **Final Stock Selection** (13 names)

Manual process, adhering to sector concentration limits

We believe a GARP strategy is "all-weather." So, what could go wrong? Two things:

1) Consensus EPS estimates are reduced after portfolio launch or the company fails to achieve them.
2) Investor sentiment turns defensive, leading to narrow market breadth and avoidance of lesser-known firms.

Note: This describes the Baker's Dozen selection, but we employ a similar approach for all portfolios (adjusted for appropriate universe or investment mandate).

David Brown’s new book and Sabrient Scorecards investor tool

Sabrient founder David Brown’s new book has been updated and relaunched as:

Moon Rocks to Power Stocks: Proven Stock-Picking Method Revealed by NASA Scientist Turned Portfolio Manager

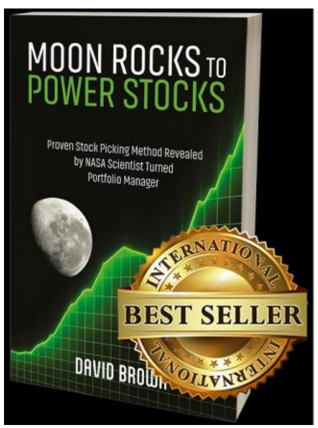
David describes his path from NASA engineer in the Apollo Program to building quant models for stock rankings. David Brown reveals the details behind the model-driven strategies for **four key investing styles—Growth, Value, Dividend, and Small Cap Growth**—which serve as the underlying strategies for Sabrient’s *Baker’s Dozen, Forward Looking Value, Dividend, and Small Cap Growth* portfolios.

You can immediately download the book and two bonus reports in PDF format. The reports are ***The Future of Energy*** and ***A New Race to the Final Frontier (Space)***, which describe the history and what the future may bring for each theme, as well as Sabrient’s top stock picks.

You also are invited to access the next generation of our **Sabrient Scorecard for Stocks**, which provides a **weekly Top 30 list** for each of those four key investing strategies (using their underlying quant models), and it let’s you sort, weight, and **monitor your own stocks**.

And as a bonus, we provide a weekly **Sabrient Scorecard for ETFs** with a **weekly Top 30 ETFs** based on our SectorCast Outlook Score, plus access to the Full Universe of scores for over 1,500 equity ETFs. Learn more at: **https://MoonRockstoPowerStocks.com**

Or to go straight to the Scorecard subscription, go to: **https://www.moonrockstopowerstocks.com/sabrient-scorecard**



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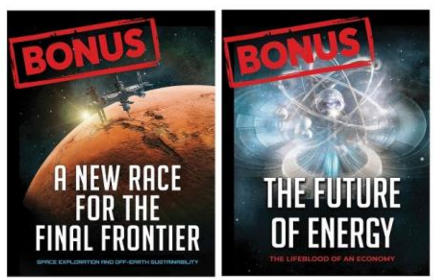

Bonus Reports

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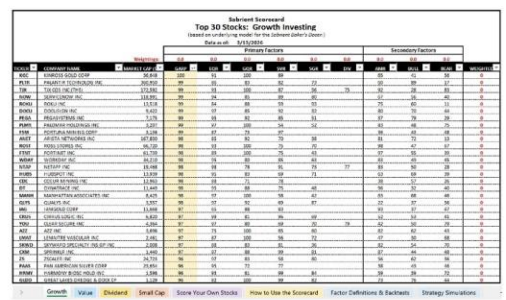

Sabrient Scorecards

Resources

1. **Latest Baker's Dozen slide deck and holdings report**
   - Go to: bakersdozen.sabrient.com/bakers-dozen-marketing-materials

2. **Sector Detector newsletter/blog post (in-depth market commentary)**
   - Go to sign-up box at: sabrient.com home page

3. **Baker's Dozen holdings report – quarterly notification list**
   - Send email request to: support@Sabrient.com

4. **David Brown's book on his investing strategies + Sabrient Scorecards**
   - *" **Moon Rocks to Power Stocks** — Proven Stock Picking Method revealed by NASA Scientist Turned Portfolio Manager "*
   - Go to: **MoonRockstoPowerStocks.com** to download book, 2 bonus reports, and access **Sabrient Scorecards** for Stocks and ETFs (for idea generation and portfolio monitoring)

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