



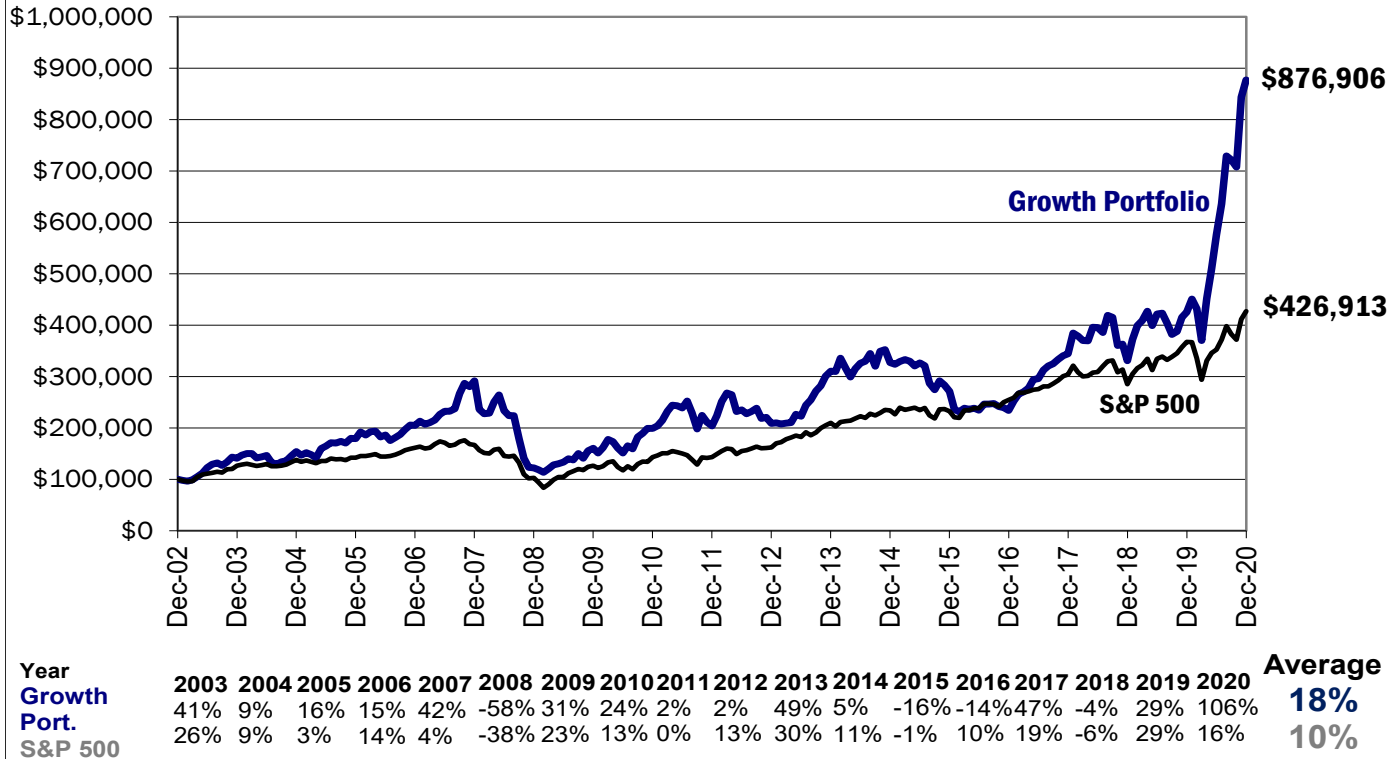
Sharek's Stock Portfolios

Searching for Tomorrow's Stock Market Winners Today



Sharek's Growth Portfolio vs. S&P 500

2003 (inception) through 2020



Portfolio Details

Value	Blend	Growth

Large
Medium
Small

Then we do fundamental research on 75-100 of these top stocks to create *Research Reports* with proprietary charts, then estimate a *Fair Value* for what each stock is worth. David Sharek then selects stocks for the main portfolio utilizing this research.

You Own the Stocks

David manages each account individually. He makes the trades for you. This isn't a mutual fund — you own the stocks. Your account is in your name and is not commingled with other clients. Clients can view accounts online, or via an app, at anytime.

Stock Research

Clients receive access to all our stock research at the *School of Hard Stocks* website.

Liquidity

We can sell the shares and have funds available for transfer within a week's notice. Clients can also transfer their account to another broker at any time.

Security

Shareks, LLC is registered with the State of New York as an investment advisor (RIA). Accounts are kept safe at brokers such as TD Ameritrade and Interactive Brokers and are insured by SIPC.

Custodians



Minimum Account Size

\$100,000

Number of Stocks

Approximately 35 to 50

Annual Management Fee

2% to 3% per year



Shareks Stock Portfolios

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Investment Strategy

Buy-and-hold portfolio holding stocks with *Estimated Long Term Growth Rates* of 15% or greater, most with reasonable valuations (P/E ratios).

Portfolio Management

We continuously search the stock market for what we believe are the top 100 stocks in the market today.

Schedule a FREE Consultation

Schedule an appointment to (1) Come into the office (2) talk on the phone or (3) do a Zoom video call at shareks.com/contact

Portfolio Manager

David started his career as a Financial Consultant at A.G. Edwards & Sons in 1999, investing clients in mutual funds, stocks, bonds & annuities.



The 2000 stock market crash crushed his investors and left David leery of Wall Street & mutual funds. Sharek became a student of stocks, and discovered the best stocks had the highest profit growth.

In 2002 David accepted a position of Vice President—Investments at Wunderlich Securities and developed his [Growth Stock Portfolio](#).

Sharek's [Growth Portfolio](#) averaged a return of 24% his first five years as a portfolio manager (2003-2007), more than double the market's (S&P 500) average of 11%.

In 2008 David Sharek founded Sharek's Stock Portfolios. But another stock market crash took the [Growth Portfolio](#) down 58% that year. Still, by 2013 client accounts hit new highs.

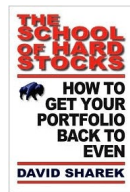
Today, David continues to manage portfolios on a fee basis from his offices in Midtown Manhattan. He also runs **The School of Hard Stocks** stock education website.

2020 was a career year for David as his [Growth Portfolio](#) jumped 106%, with double-digit returns (+10% or more) in 6 of the 12 months.

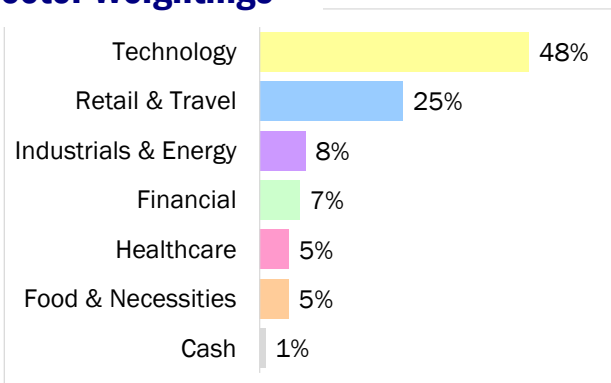
Since inception, Sharek's [Growth Portfolio](#) has made investors 18% a year after fees, compared to 10% for the S&P 500 (2003-2020).

He's posted five years of +40% returns in his 18 year career as a portfolio manager.

What to learn more about stocks? Check out *The School of Hard Stocks* on Amazon.com, or visit schoolofhardstocks.com



Sector Weightings



Portfolio Holdings

Growth Portfolio - Holdings as of 12/31/20						
	Security name	Ticker	Portfolio Percent	Est LTG	Yield	Est. Total Return
1	Tesla	TSLA	6.9%	354%	0%	354%
2	Cloudflare	NET	5.5%	N/A	0%	N/A
3	Sea	SE	5.5%	N/A	0%	N/A
4	The Trade Desk	TTD	4.9%	29%	0%	29%
5	MercadoLibre	MELI	3.7%	N/A	0%	N/A
6	JD.com	JD	3.6%	46%	0%	46%
7	Amazon	AMZN	3.2%	36%	0%	36%
8	Farfetch	FTCH	3.1%	N/A	0%	N/A
9	Square	SQ	2.6%	39%	0%	39%
10	NVIDIA	NVDA	2.5%	22%	0%	22%
11	PayPal	PYPL	2.2%	23%	0%	23%
12	Facebook	FB	2.1%	17%	0%	17%
13	Zoom	ZM	2.1%	131%	0%	131%
14	Shopify	SHOP	2.1%	105%	0%	105%
15	ServiceNow	NOW	2.0%	28%	0%	28%
16	Alibaba	BABA	1.7%	25%	0%	25%
17	Dollar General	DG	1.6%	15%	1%	16%
18	Teledoc	TDOC	1.6%	-1%	1%	0%
19	Roku	ROKU	1.6%	14%	0%	14%
20	HubSpot	HUBS	1.6%	50%	0%	50%
21	Chegg	CHGG	1.5%	25%	0%	25%
22	Fastly	FSLY	1.5%	30%	1%	31%
23	Fubo	FUBO	1.5%	N/A	1%	N/A
24	Etsy	ETSY	1.5%	57%	0%	57%
25	Snap	SNAP	1.5%	N/A	1%	N/A
26	Invitae	NVTA	1.4%	N/A	0%	N/A
27	Pinduoduo	PDD	1.4%	N/A	0%	N/A
28	Five Below	FIVE	1.4%	14%	0%	14%
29	Chipotle	CMG	1.4%	26%	0%	26%
30	Celsius	CELH	1.3%	N/A	1%	N/A
31	Paycom Software	PAYC	1.3%	14%	0%	14%
32	Zscaler	ZS	1.2%	45%	0%	45%
33	Salesforce	CRM	1.2%	19%	0%	19%
34	Sterling Construc	STRL	1.2%	N/A	1%	N/A
35	Adobe Systems	ADBE	1.2%	17%	0%	17%
36	Global Payments	GPN	1.2%	17%	0%	17%
37	Veeva Systems	VEEV	1.2%	18%	0%	18%
38	StoneCo	STNE	1.2%	49%	1%	50%
39	Microsoft	MSFT	1.2%	15%	1%	16%
40	Bilibili	BILI	1.1%	N/A	1%	N/A
41	Autodesk	ADSK	1.1%	35%	0%	35%
42	Exact Sciences	EXAS	1.0%	N/A	0%	N/A
43	Lululemon	LULU	1.0%	16%	0%	16%
44	Wingstop	WING	1.0%	22%	0%	22%
45	Splunk	SPLK	1.0%	4%	0%	4%
46	Floor & Décor	FND	0.9%	26%	0%	26%
47	Okta	OKTA	0.9%	N/A	0%	N/A
48	Yeti	YETI	0.9%	20%	0%	20%
49	Tencent	TCEHY	0.8%	25%	0%	25%
50	Pinterest	PINS	0.8%	N/A	0%	N/A
51	New Oriental Edu	EDU	0.8%	31%	0%	31%
52	Ollie's Bargain	OLLI	0.7%	20%	0%	20%
53	Agora	API	0.7%	N/A	0%	N/A
54	Netflix	NFLX	0.7%	41%	0%	41%
	Cash		1.0%			
	Total		100%	39%	0%	39%

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