



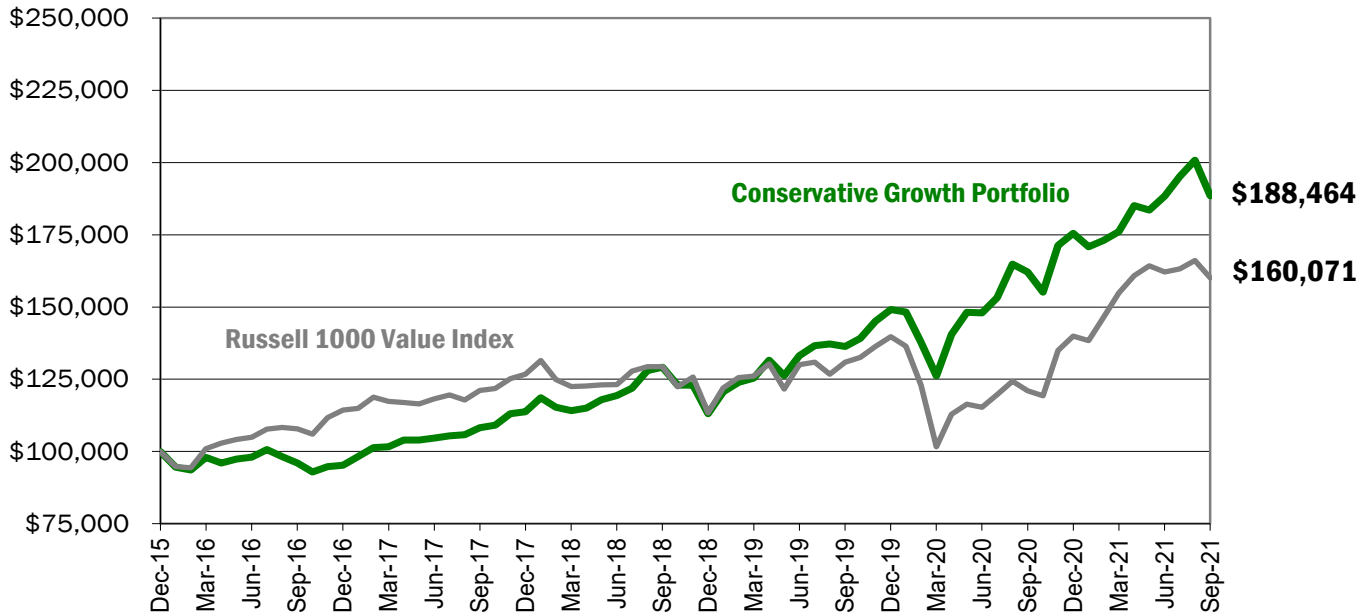
Sharek's Stock Portfolios

Searching for Tomorrow's Stock Market Winners Today



Sharek's Conservative Portfolio vs. Russell 1000 Value Index

2016 (inception) through September 2021



Year	2016	2017	2018	2019	2020	2021	Average
Conservative Portfolio	-5%	19%	-1%	32%	18%	7%	12%
Russell 1000 Value Index	14%	11%	-11%	23%	0%	14%	9%

Portfolio Details

Value	Blend	Growth
Large		
Medium		
Small		

are the top 100 stocks in the market today.

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.

Investment Strategy

A conservative growth portfolio holding relatively safe stocks with *Estimated Long Term Growth Rates + Dividend Yields* of 10% or greater.

Portfolio Management

We continuously search the stock market for what we believe

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 30 to 50

Annual Management Fee

1% to 2% per year

Shareks Stock Portfolios

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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.

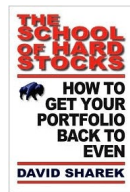
Today, David continues to manage portfolios on a fee basis from his offices in Midtown Manhattan. He also runs **The School of Hard Stocks** stock education website.

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



Contact Us



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Portfolio Holdings

Power Rankings as of July 16, 2021

	Security name	Ticker	Est LTG	Yield	Est. Total Return
1	Alphabet	GOOGL	21%	0%	21%
2	Facebook	FB	24%	0%	24%
3	Amazon	AMZN	39%	0%	39%
4	Booking	BKNG	15%	0%	15%
5	Target	TGT	10%	1%	11%
6	Apple	AAPL	18%	1%	19%
7	DR Horton	DHI	12%	1%	13%
8	Microsoft	MSFT	17%	1%	18%
9	Dollar General	DG	14%	1%	15%
10	Walt Disney	DIS	10%	0%	10%
11	Fortinet	FTNT	16%	0%	16%
12	Pool Corp	POOL	18%	1%	19%
13	Nike	NKE	18%	1%	19%
14	Adobe Systems	ADBE	18%	0%	18%
15	Visa	V	19%	1%	20%
16	Fiserv	FISV	18%	0%	18%
17	Salesforce	CRM	13%	0%	13%
18	Sherwin-Williams	SHW	10%	1%	11%
19	Waste Management	WMT	13%	2%	15%
20	Becton Dickinson	BDX	12%	1%	13%
21	UnitedHealth	UNH	13%	1%	14%
22	Stryker	SYK	13%	1%	14%
23	MasterCard	MA	21%	0%	21%
24	Starbucks	SBUX	15%	2%	17%
25	S&P Global	SPGI	11%	1%	12%
26	Johnson & Johnson	JNJ	7%	3%	10%
27	Domino's	DPZ	11%	1%	12%
28	McDonald's	MCD	12%	2%	14%
29	TJX Companies	TJX	12%	2%	14%
30	Acenture	ACN	10%	1%	11%
31	Ross Stores	ROST	12%	1%	13%
32	Constellation Brar	STZ	9%	1%	10%
33	Pepsico	PEP	9%	3%	12%
34	Ecolab	ECL	16%	1%	17%
35	Costco	COST	9%	1%	10%
36	Factset Reseach	FDS	6%	1%	7%
	Average		14%	1%	15%

Schedule a free consultation at: shareks.com/contact

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