



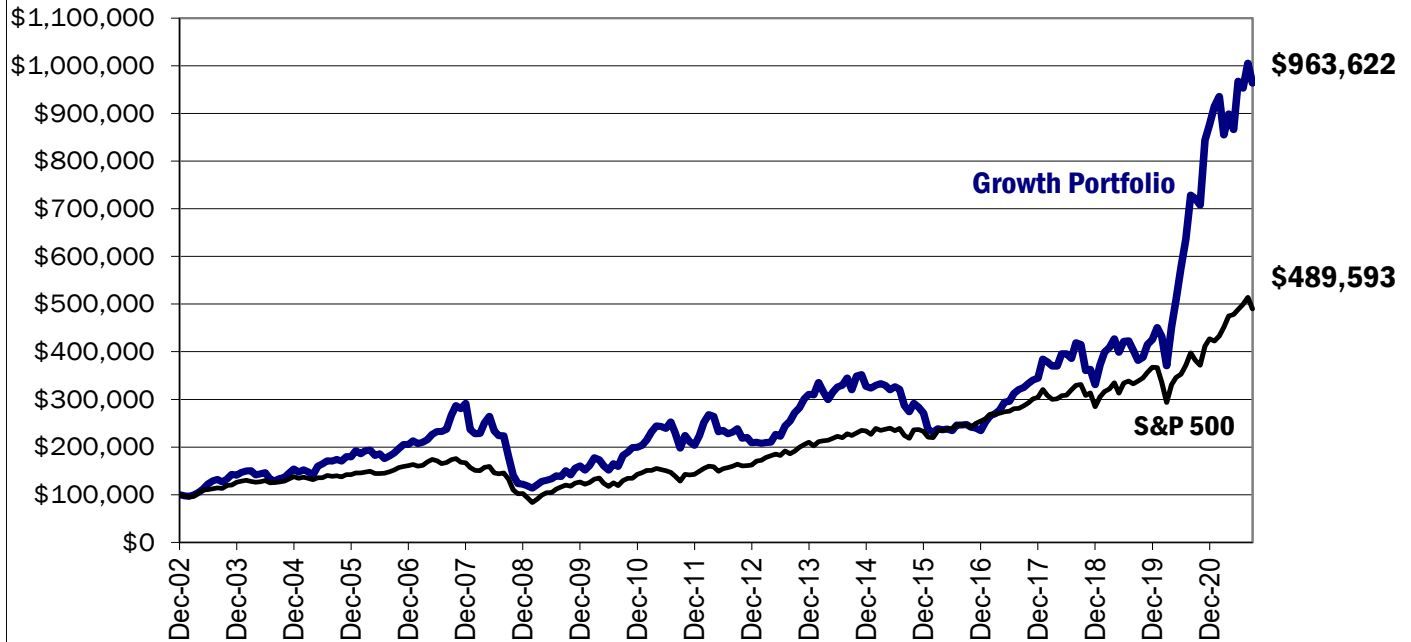
Sharek's Stock Portfolios

Searching for Tomorrow's Stock Market Winners Today



Sharek's Growth Portfolio vs. S&P 500

2003 (inception) through September 2021



Year
Growth
Port.
S&P 500

Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Growth Port.	41%	9%	16%	15%	42%	-58%	31%	24%	2%	2%	49%	5%	-16%	-14%	47%	-4%	29%	106%	10%
S&P 500	26%	9%	3%	14%	4%	-38%	23%	13%	0%	13%	30%	11%	-1%	10%	19%	-6%	29%	16%	15%

Avg
18%
10%

Portfolio Details

Value	Blend	Growth

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

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

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



Sharek's Stock Portfolios

99 Madison Avenue, 5th Floor
New York, NY 10037

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.

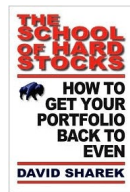
Today, David continues to manage portfolios on a fee basis from his offices in Midtown Manhattan. He also runs **The School of Hard Stocks** stock education website.

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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Schedule a free consultation at: shareks.com/contact

Portfolio Holdings

Power Rankings as of July 16, 2021

	Security name	Ticker	Est LTG	Yield	Est. Total Return
1	NVIDIA	NVDA	27%	0%	27%
2	Sea	SE	N/A	0%	N/A
3	Snap	SNAP	N/A	0%	N/A
4	Tencent	TCEHY	28%	0%	28%
5	Futu	FUTU	N/A	0%	N/A
6	Cloudflare	NET	N/A	0%	N/A
7	Alphabet	GOOGL	21%	0%	N/A
8	Amazon	AMZN	39%	0%	39%
9	Floor & Décor	FND	28%	0%	28%
10	Pinterest	PINS	N/A	0%	N/A
11	PayPal	PYPL	24%	0%	24%
12	The Trade Desk	TTD	29%	0%	29%
13	HubSpot	HUBS	37%	0%	37%
14	Facebook	FB	24%	0%	24%
15	Roku	ROKU	N/A	0%	N/A
16	Farfetch	FTCH	N/A	0%	N/A
17	Square	SQ	54%	0%	54%
18	Chipotle	CMG	55%	0%	55%
19	RH	RH	20%	0%	20%
20	Shopify	SHOP	27%	0%	27%
21	Netflix	NFLX	45%	0%	45%
22	Tesla	TSLA	45%	0%	45%
23	Etsy	ETSY	53%	0%	53%
24	JD.com	JD	23%	0%	23%
25	StoneCo	STNE	49%	0%	49%
26	Twitter	TWTR	40%	0%	N/A
27	MercadoLibre	MELI	N/A	0%	N/A
28	Zoom	ZM	35%	0%	35%
29	Five Below	FIVE	28%	0%	28%
30	Global Payments	GPN	19%	0%	19%
31	Autodesk	ADSK	36%	0%	36%
32	Yeti	YETI	21%	0%	21%
33	Lululemon	LULU	23%	0%	23%
34	Wingstop	WING	18%	0%	18%
35	Microsoft	MSFT	17%	1%	18%
36	ServiceNow	NOW	21%	0%	21%
37	Adobe Systems	ADBE	18%	0%	18%
38	Paycom Software	PAYC	26%	0%	26%
	Average		31%	0%	31%

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