



Hyre Personal Wealth Advisors

Core Stock Growth Portfolio

For investors seeking above average long term growth

Core Stock Growth Portfolio Screening Process

We focus on finding twenty-five stocks of larger-sized companies with a history of earnings growth across multiple sectors of the S&P 500. In doing so, we seek to improve portfolio performance over the long term. Specifically, we seek the following qualities:

- Has a strong buy rating from multiple analysts
- Exhibits a history of financial and earnings strength
- The price volatility of the stock is in-line with or slightly below that of the S&P 500
- The stock valuation as measured by P/E; P/S; and forecasted cash flows are all favorable.
- The price movement of the stock is in a long-term uptrend

Stocks that pass the initial screen are then scored based on the criteria above, resulting in the top 25 selections.

Over time, the composition of your portfolio will change, as we seek out the best investment candidates. From month to month however, we typically see only minor changes.

2074 Arlington Avenue
Upper Arlington, Ohio 43221
614-225-9400

Securities offered through Raymond James Financial Services, Inc., Member FINRA/ SIPC

Who Might Benefit From This Approach?

Investing in a well researched, diversified portfolio of large sized growth stocks is well suited for **Those seeking growth of capital** – Large and Mid-sized companies demonstrating a history of strong or rising earnings growth over time offer the potential for future growth. Over time, earnings growth drives stock prices. Those investors who are more interested in the growth of their investment capital versus income are well suited for a growth focused portfolio.

What Should You Expect Over Time?

With time, we expect that our core stock growth portfolio will provide above average stock price appreciation. With our emphasis on diversifying across sectors of the S&P 500 and focusing on large-sized and mid-sized companies with a history of earnings growth, we believe that the long-term investor can expect better than average growth of their investment capital.

This doesn't mean however that some stock selections can't underperform. If something fundamentally changes with the company, such as a newsworthy event, a significant change in the company's fundamentals, a change of rating by an analyst, we will reconsider it's place in our portfolio and if necessary, replace it with a better candidate.

Core Stock Growth Portfolio Sell Discipline

As we continue to monitor each position in our portfolio for ongoing suitability, on occasion, we may encounter one or more reasons to replace it within our portfolio. Specifically, we monitor the following criteria:

- Change of rating by the analyst community
 - Downgrades are closely analyzed, but downgrades alone are not a reason to sell
- Better idea in a particular area – Our goal is to own the most attractive stocks in each favorable area
- Significant Underperformance – If the stock demonstrates significant underperformance relative to the general market or to it's specific industry group

Every investor's situation is unique and you should consider your investment goals, risk tolerance and time horizon before making any investment. Investing involves risk and you may incur a profit or loss regardless of strategy selected.