



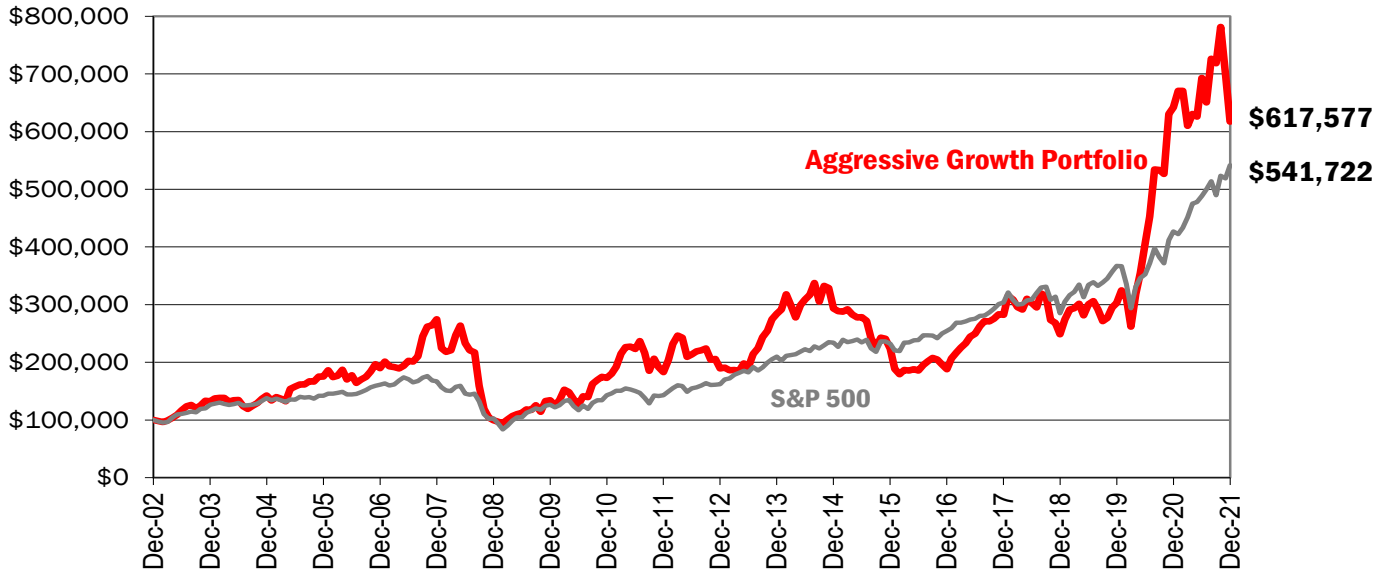
# Sharek's Stock Portfolios

Searching for Tomorrow's Stock Market Winners Today



## Sharek's Aggressive Growth Portfolio vs. S&P 500

2003 (inception) through 2021



Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	Avg
Agg Growth	32%	8%	23%	8%	45%	-64%	35%	29%	6%	3%	50%	3%	-23%	-16%	50%	-12%	22%	112%	-4%	16%
S&P 500	26%	9%	3%	14%	4%	-38%	23%	13%	0%	13%	30%	11%	-1%	10%	19%	-6%	29%	16%	27%	11%

## Portfolio Details

Value	Blend	Growth	
			Large
			Medium
			Small

### Investment Strategy

A portfolio holding speculative stocks with *Estimated Long Term Growth Rates* of 20% or greater, most with high valuations (P/E ratios) and/or no profits.

### Portfolio Management

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

Then we do fundamental re-

search 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 25 to 50

### Annual Management Fee

2% to 3% per year



### Shareks Stock Portfolios

99 Madison Avenue  
5th Floor  
New York, NY 10016  
+1 646 430 5641

### 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](https://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.

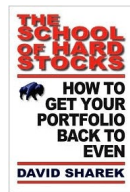
Today, David continues to manage portfolios on a fee basis from his offices in Midtown Manhattan. He also runs **The School of Hard Stocks** stock education website.

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 17% a year after fees, compared to 11% for the S&P 500 (2003-2021).

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](http://schoolofhardstocks.com)



## Contact Us



**Shareks Stock Portfolios**  
99 Madison Avenue  
5th Floor  
New York, NY 10016  
+1 646 430 5641

**Schedule a Free Consultation:**



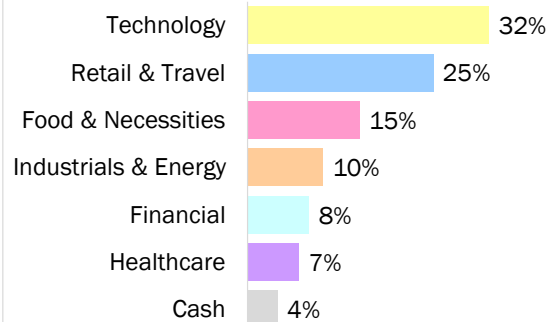
**Shareks Stock Portfolios**  
99 Madison Avenue  
5th Floor  
New York, NY 10016  
+1 646 430 5641

[shareks.com/contact](http://shareks.com/contact)

## Portfolio Holdings

### Power Rankings as of 12/31/21

	Security name	Ticker	Portfolio Percent	Rev Growth
1	Nvidia	NVDA	10.0%	32%
2	Sea	SE	5.6%	68%
3	Upstart	UPST	5.1%	108%
4	Applovin	APP	4.3%	68%
5	Celsius	CELH	4.2%	79%
6	Atlassian	TEAM	3.7%	26%
7	Zscaler	ZS	3.5%	47%
8	Square	SQ	3.4%	38%
9	MercadoLibre	MELI	3.3%	48%
10	Hubspot	HUBS	3.2%	33%
11	ZoomInfo	ZI	3.0%	40%
12	Digital Ocean	DOCN	2.9%	32%
13	Global-E Online	GLBE	2.9%	61%
14	Snap	SNAP	2.9%	48%
15	CrowdStrike	CRWD	2.8%	45%
16	Tecnoglass	TGLS	2.8%	18%
17	Roblox	RBLX	2.8%	79%
18	Unity	U	2.6%	33%
19	Affirm	AFRM	2.4%	55%
20	Marqeta	MQ	2.3%	46%
21	Cloudflare	NET	2.3%	40%
22	Elastic	ESTC	2.1%	35%
23	Dutch Bros	BROS	2.1%	39%
24	SentinelOne	S	2.0%	84%
25	Farfetch	FTCH	1.8%	29%
26	Okta	OKTA	1.8%	44%
27	Upwork	UPWK	1.7%	27%
28	Asana	ASAN	1.7%	N/A
29	DocuSign	DOCU	1.6%	39%
30	dLocal	DLO	1.0%	84%
31	Palantir	PLTR	0.5%	33%
	Cash		7.6%	
	<b>Total</b>		<b>100%</b>	<b>49%</b>



Any information provided in this letter has been prepared from sources believed to be reliable, but is not guaranteed by SchoolofHardStocks.com and/or Shareks, LLC and is not a complete summary or statement of all available data necessary for making an investment decision. In addition, such information may be condensed or contain calculated data which should be verified by the recipient. Any information provided is for informational purposes only and does not constitute a recommendation. To the extent that financial projections are contained herein, such projections are dependent on the occurrence of future events, which cannot be assured; therefore, the actual results achieved during the projection period, if applicable, may vary from the projections. SchoolofHardStocks.com and its employees may own options, rights or warrants to purchase any of the securities mentioned in this letter. Any review, retransmission, dissemination or use of, or taking action in reliance upon this information by persons or entities other than the intended recipient is prohibited.