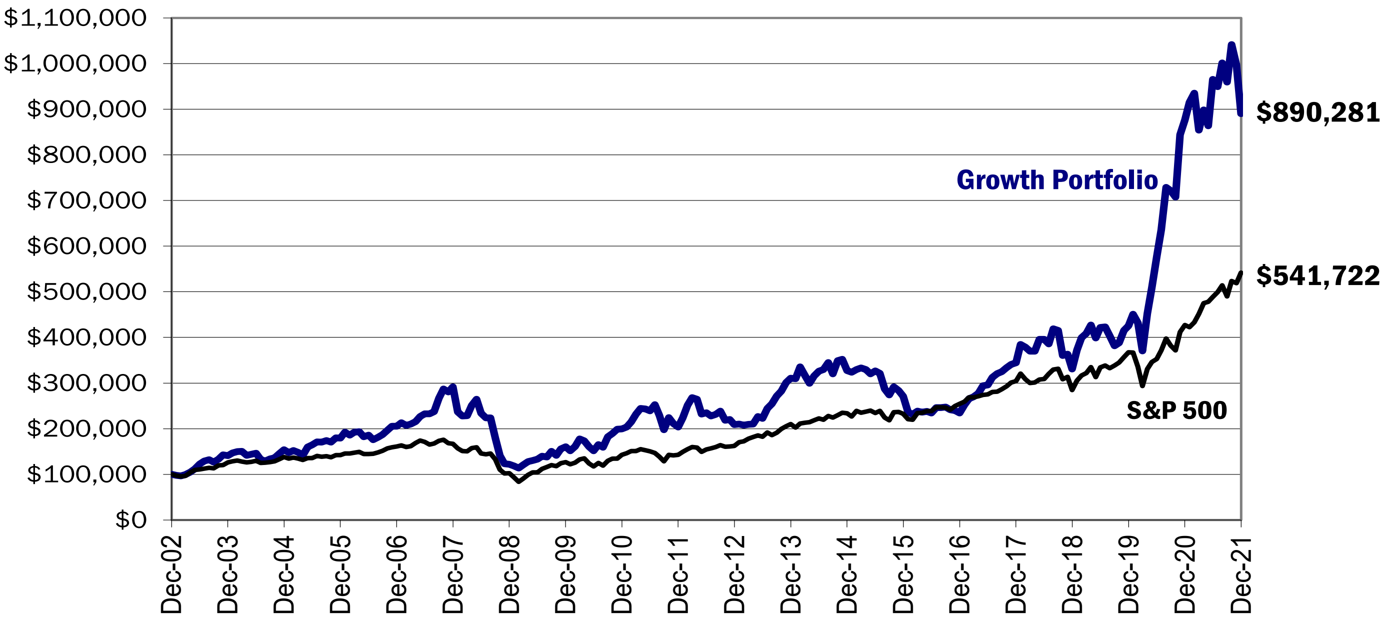
Sharek's Stock Portfolios

Searching for Tomorrow's Stock Market Winners Today

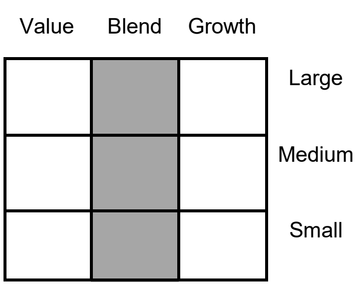
Sharek's Growth Portfolio vs. S&P 500

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
Growth Port.	41%	9%	16%	15%	42%	-58%	31%	24%	2%	2%	49%	5%	-16%	-14%	47%	-4%	29%	106%	2%	17%
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



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.

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

TD Ameritrade

Interactive Brokers

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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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%.

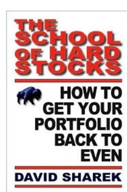
In 2008 David Sharek founded Sharek's Stock Portfolios. But another stock market crash took the Growth Portfolio down 58% that year. Still, by 2013 client accounts hit new highs.

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 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

Contact Us

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Top Holdings as of 12/31/21

	Security name	Ticker	Portfolio Percent	Est LTG
1	Nvida	NVDA	11.0%	39%
2	Sea	SE	7.0%	N/A
3	The Trade Desk	TTD	5.4%	32%
4	Tesla	TSLA	4.8%	73%
5	Amazon	AMZN	4.5%	21%
6	Alphabet	GOOGL	3.9%	21%
7	Floor & Décor	FND	3.3%	33%
8	Palo Alto Networks	PANW	3.2%	26%
9	Cloudflare	NET	3.2%	N/A
10	Shopify	SHOP	3.0%	29%
11	Hubspot	HUBS	3.0%	36%
12	Target	TGT	2.9%	15%
13	Square	SQ	2.7%	47%
14	Upstart	UPST	2.6%	179%
15	Coinbase	COIN	2.3%	67%
16	Paypal	PYPL	2.2%	21%
17	Affirm	AFRM	2.1%	N/A
18	Mircosoft	MSFT	2.1%	17%
19	Netflix	NFLX	2.0%	42%
20	Meta	FB	2.0%	21%
21	Airbnb	ABNB	1.8%	100%
22	Five Below	FIVE	1.8%	39%
23	Etsy	ETSY	1.7%	40%
24	Chiptole Mexican Gr	CMG	1.7%	45%
25	Servicenow	NOW	1.7%	26%
26	RH	RH	1.6%	24%
27	Adobe Systems	ADBE	1.6%	15%
28	Paycom Software	PAYC	1.4%	26%
29	Wingstop	WING	1.4%	12%
30	Lululemon Athletica	LULU	1.3%	28%
31	Yeti	YETI	1.2%	22%
32	Autodesk	ADSK	1.2%	29%
33	Snap	SNAP	0.7%	19%
34	Pinterest	PINS	0.3%	49%
		Cash	7.2%	
		Total	**100%**	**38%**