

Rivkin US Momentum Strategy

1 APRIL 2019

The US Momentum Strategy is one of four Rivkin Global strategies. This strategy identifies the strongest trending stocks from the S&P 500 universe and aims to hitch a ride on their upward movements.

Closed trades over the past five months are shown. For complete trade history, please see website.

RETURN PROFILE	AMOUNT*
Since 1 January 2019	14.3%
Average annual return over 15 year back-tested period	16.6%
S&P 500 Return since 1 January	13.6%

ROLLING RETURNS	3-MONTH	6-MONTH	9-MONTH	12-MONTH
Return	14.0%	-4.5%	-5.0%	-4.2%

CLOSED TRADES (RECENT)

STOCK	DIRECTION	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT PRICE	GROSS P/L (%)
ABMD	Long	Sep-18	\$410.70	Nov-18	\$357.00	-13.08%
AAP	Long	Oct-18	\$170.47	Nov-18	\$159.96	-6.17%
DISCA	Long	Oct-18	\$32.53	Nov-18	\$32.41	-0.37%
HCA	Long	Oct-18	\$140.30	Nov-18	\$134.70	-3.99%
ILMN	Long	Sep-18	\$352.90	Nov-18	\$311.86	-11.63%
NTAP	Long	Jul-18	\$79.81	Nov-18	\$78.48	-1.67%
ORLY	Long	Oct-18	\$346.85	Nov-18	\$319.11	-8.00%
TSCO	Long	Oct-18	\$90.59	Nov-18	\$91.95	1.50%
WCG	Long	Oct-18	\$321.46	Nov-18	\$277.15	-13.78%
TLT	Long	Nov-18	\$113.17	Mar-19	\$119.33	5.44%
UUP	Long	Nov-18	\$25.67	Mar-19	\$25.63	-0.16%
GOLD	Long	Nov-18	\$161.34	Mar-19	\$174.20	7.97%

Contact us

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