

Rivkin US Momentum Strategy

1 MAY 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	12.8%
Average annual return over 15 year back-tested period	16.6%
S&P 500 Return since 1 January	17.8%

ROLLING RETURNS	3-MONTH	6-MONTH	9-MONTH	12-MONTH
Return	12.5%	8.4%	-0.04%	7.6%

CLOSED TRADES (RECENT)

STOCK	DIRECTION	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT PRICE	GROSS P/L (%)
TLT:xnas	Long	Nov-18	\$113.17	Mar-19	\$119.33	5.44%
UUP:arcx	Long	Nov-18	\$25.67	Mar-19	\$25.63	-0.16%
GOLD:xasx	Long	Nov-18	\$161.34	Mar-19	\$174.20	7.97%
MRK:xnys	Long	Mar-19	\$82.00	Apr-19	\$83.81	2.21%
O:xnys	Long	Apr-19	\$72.55	Apr-19	\$70.01	-3.50%
AES:xnys	Long	Mar-19	\$17.53	Apr-19	\$17.12	-2.34%
ULTA:xnas	Long	Apr-19	\$353.37	Apr-19	\$348.98	-1.24%
AMT:xnys	Long	Apr-19	\$193.25	Apr-19	\$195.30	1.06%
ORLY:xnas	Long	Apr-19	\$393.00	Apr-19	\$378.57	-3.67%
TDG:xnys	Long	Mar-19	\$440.12	Apr-19	\$457.55	3.96%
WELL:xnys	Long	Apr-19	\$77.24	Apr-19	\$74.53	-3.51%
SBUX:xnas	Long	Mar-19	\$70.99	Apr-19	\$74.76	5.31%
LLY:xnys	Long	Mar-19	\$129.84	Apr-19	\$130.73	0.69%
BA:xnys	Long	Mar-19	\$443.40	Apr-19	\$385.56	-13.04%
BLL:xnys	Long	Mar-19	\$55.43	Apr-19	\$58.05	4.73%
MHK:xnys	Short	Apr-19	\$127.52	May-19	\$136.25	6.85%
STZ:xnys	Short	Mar-19	\$172.57	May-19	\$211.67	22.66%
FDX:xnys	Short	Mar-19	\$184.07	May-19	\$189.46	2.93%
CXO:xnys	Short	Apr-19	\$112.32	May-19	\$115.38	2.72%
EOG:xnys	Short	Apr-19	\$97.02	May-19	\$96.05	-1.00%
EMN:xnys	Short	Apr-19	\$78.67	May-19	\$78.88	0.27%
LYB:xnys	Short	Mar-19	\$85.11	May-19	\$88.23	3.67%
SPY:arcx	Long	Apr-19	\$286.04	May-19	\$294.02	2.79%

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