

Rivkin US Momentum Strategy

1 AUGUST 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	-8.9%
Average annual return over 15 year back-tested period	16.6%
S&P 500 Return since 1 January	20.2%

ROLLING RETURNS	3-MONTH	6-MONTH	9-MONTH	12-MONTH
Return	-6.7%	-8.9%	-3.50%	-8.7%

CLOSED TRADES (RECENT)

STOCK	DIRECTION	ENTRY MONTH	ENTRY PRICE	EXIT MONTH	EXIT PRICE	GROSS P/L (%)
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%
KEYS:xnys	Long	May-19	\$85.75	Jun-19	\$75.15	-12.36%
CMG:xnys	Long	Apr-19	\$703.00	Jun-19	\$657.63	-6.45%
AZO:xnys	Long	Mar-19	\$934.41	Jun-19	\$1,027.12	9.92%
CDNS:xnas	Long	Mar-19	\$58.88	Jun-19	\$63.31	7.52%
FTNT:xnas	Long	May-19	\$91.82	Jun-19	\$72.32	-21.24%
AVGO:xnas	Long	May-19	\$319.98	Jun-19	\$252.55	-21.07%
TDG:xnys	Long	May-19	\$476.90	Jun-19	\$440.25	-7.69%
AMD:xnas	Long	May-19	\$26.90	Jun-19	\$28.73	6.80%
XLNX:xnas	Long	Mar-19	\$127.03	Jun-19	\$103.55	-18.48%
MSCI:xnys	Long	May-19	\$225.09	Jun-19	\$220.01	-2.26%
USDINDEXJUN19	Long	Jun-19	\$97.14	Jun-19	\$97.06	-0.09%
TLT:xnas	Long	Jun-19	\$131.40	Jul-19	\$132.56	0.88%
XAUAUD	Long	Jun-19	\$1,896.68	Jul-19	\$1,987.29	4.78%
USDINDEXSEP19	Long	Jun-19	\$96.53	Jul-19	\$95.89	-0.66%

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