



The New Way to Track and Analyze Investments

April 9, 2026

John Bajkowski
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AAII Investor Hub

Central location for AAIH members to access key educational and investment research resources

- My Portfolio is the center for analysis
 - data views of personal and AAIH Model Portfolios
- Ask James
 - AI driven search and research
- My Library
 - Save and organize articles and content
- AAIH Stock Screens
 - Popular starting for portfolio construction
- App for computers, phones & tablets

AAII Investor Hub

- Primary First Quarter 2026 Enhancements
- Portfolio
 - Sync Brokerage Portfolio Holdings
 - Create Custom Views (A+/Platinum)
 - View Model Portfolio Holdings within hub Portfolio section
- AAI Stock Screens
 - Enhanced Performance, Risk and Characteristic Views
 - See which companies passed given screen historically
- Refreshed Investor Hub Home Page

Investor Education: Stock reseai
+
Ask Gemini

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AAII
American Association of Individual Investors

My Tools
John

AAII Journal
Sentiment Survey
Model Portfolios
Stocks
ETFs
Mutual Funds
Learn
About AAI

State Street®SPDR®DowJonesIndstrAvgETFTr
478.52 (0.13%)

iShares Core S&P Mid-Cap ETF
70.38 (0.21%)

iShares Core S&P Small-Cap ETF
129.69 (0.11%)

iShares Core S&P 500 ETF
678.52 (0.07%)

Equal Weighting Across Market-Cap Sizes Beats a Total Market Fund

Does Citizens Community Bancorp, Inc. (CZWI) Have Momentum?

April 9, 2026 | By Omar Beirat

Does Anbio Biotechnology (NNNN) Have Momentum?

April 9, 2026 | By Jenna Brashear

Current Sentiment

Bearish (43)

Where will the market go?

Up (Bullish)

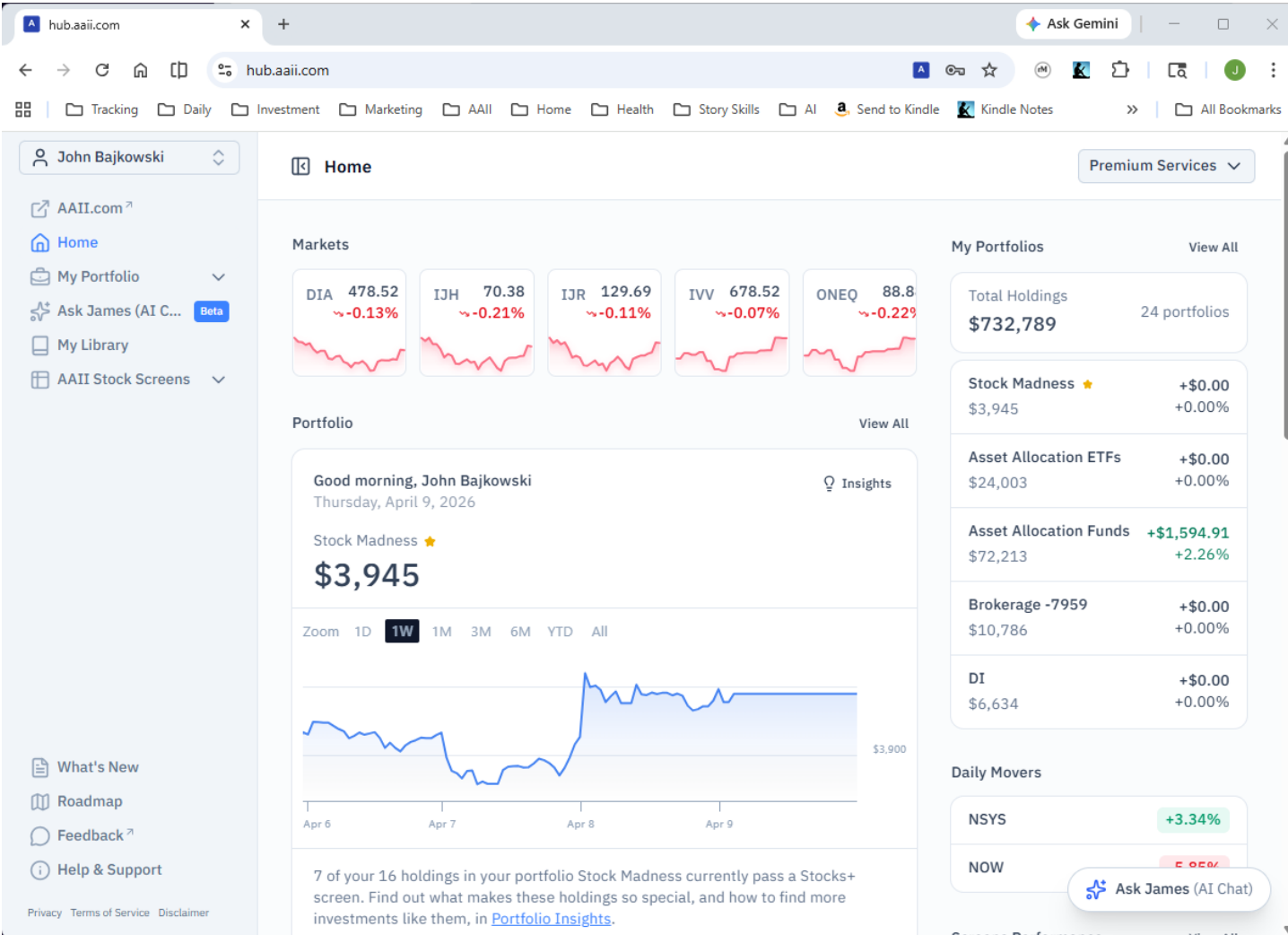
Vote

My AAI

- Investor Hub
- My Portfolio
- My Stock Screens
- My Library
- Classes
- AAII Platinum
- A+ Investor
- Stock Investor Pro
- Sentiment Investing
- Retirement Investing
- Bits and Bips

Model Portfolios

- AAII Platinum
- Dividend Investing
- Growth Investing
- Shadow Stocks
- Stock Superstars Report
- VMQ Stocks



Side panel offers quick access to major sections of the hub

- AAII.com
- Home
- My Portfolio
 - Personal Portfolios
 - Brokerage Linked Portfolio
 - AAII Model Portfolio
- Ask James
- My Library
- AAII Stock Screens

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My Portfolios

Mixed Assets

Shadow

Asset Allocation Fun...

SSR G3

Asset Allocation ETFs

SSR G1

SSR G2

Top 50 Held Stocks

Stock Madness

SSR G4

SSR G3 Ideas

Shadow - Ideas

Dividend Aristocrats

DJ 30

Manage

Create Portfolio

Manage Alerts

Manage Custom Views

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Portfolio

View All

Good morning, John Bajkowski

Thursday, April 9, 2026

Stock Madness

\$3,946

Zoom 1D 1W 1M 3M 6M YTD All



Apr 6 Apr 7 Apr 8 Apr 9 \$3,900

7 of your 16 holdings in your portfolio Stock Madness currently pass a Stocks+ screen. Find out what makes these holdings so special, and how to find more investments like them, in [Portfolio Insights](#).

Recommended For You

View All



April 01, 2026

Equal Weighting Across Market



April 09, 2026

Does Citizens Community



April 09, 2026

Does Anbio Biotechnology

What's New

Roadmap

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Favorited Portfolio is featured on the home of the hub with link to insights

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AAII Stock Screens

Stock Madness

Premium Services

Stock Madness

Overview Grades Plus Diversification Plus Insights Plus AI Manage Alerts Manage Custom Views Modify Portfolio

Dashboard / All Portfolios / Stock Madness / Insights

Total Securities Following 16

Stocks Pass a Stocks+ Screen 7

Grades B or Greater 38 of 80

Fund/ETF Insights 0

Stocks+ Screens Overview

7 of your 16 holdings currently pass a Stocks+ screen. Have a look at the list of strategies below and learn about the techniques behind them.

Ticker & Matching Strategy	10-Year Return
+ AAPL	26.3%
+ BRK.B	13.2%
+ CVX	6.8%
+ GOOGL	23.7%
Value on the Move--PEG With Hist Growth Screen	13.1%
P/E Relative Screen	10.9%
Fundamental Rule of Thumb Screen	-4.3%
Dogs of the Dow Screen	5.2%

Insights Summary

The Dow Jones industrial average has increased by 2.9% since the close on Apr 2, 2026. Remember that short-term volatility is not a reflection of long-term value.

Add BOOM to Portfolio

Select a portfolio to add this stock to

☒ Shadow Default portfolio

☐ Growth Ideas 26-01-14

☐ SSR G4 - Ideas 12/17

☐ Wanger Stocks

☐ S&P MidCap 400

☐ Lots of fun

☐ Shadow - Ideas

Ask James (AI Chat)

My Portfolio Tool

- Keep track of your holdings
 - Stocks, mutual funds and ETFs
 - Cash and bond holding values
- Portfolios
 - Manually Tracked
 - Brokerage Linked via Plaid
 - AAII Model Portfolios
- Evaluate your portfolio holdings and ideas
 - Stock and mutual fund grades
 - Custom Views
- Assess, adjust and control your risk
 - Make smarter asset allocation decisions
 - Diversification Analyzer
- Portfolio Insights

Major Changes

- **Simpler Portfolio Modifications:** Adding an investment to or removing an investment from an existing portfolio can now be done with just a few clicks while viewing your portfolio. You can also still add investments to your portfolio by clicking on the “+” sign adjacent to any stock, exchange-traded fund (ETF) or mutual fund on AAI.com.
- **Portfolio Creation**
 - **Manually**
 - **Import Holdings:** import holding using a CSV spreadsheet file.
 - **Brokage Linked:** Pull in portfolio holdings via Plaid
- **Analyze Your Portfolios via Web App on computer, phone or tablet**

Major Changes

- **Customized Views:** Ability to create rich collection of thousands of stock, industry, sector information which can be combined in a spreadsheet like views which can be viewed and/or downloaded
- **Model Portfolio Views:** This customized view makes it easy to analyze your portfolio using the same criteria used to analyze the Model AAI Portfolios

Importing a Portfolio

Portfolio List

Dashboard / All Portfolios

- Asset Allocation ET...
- Growth Investing
- SSR G2
- SSR G4
- SSR G1 Ideas
- SSR G2 Ideas
- Lots of fun
- SSR G3 Ideas
- Wanger Stocks
- Shadow-Ideas
- Dividend Aristocrats
- DJ 30

Create New Portfolio

Securely creating a portfolio with AAIi lets you evaluate your holdings all in one place.

1 Import 2 Details 3 Transactions

Create Manually
Manually search and add tickers to build your portfolio.

Import CSV / Paste List
Upload a spreadsheet or paste a list of tickers.

Link A Brokerage Account
Securely link your broker account and let us do the rest.
[How linked brokerage accounts work](#)

Create New Portfolio

Securely creating a portfolio with AAIi lets you evaluate your holdings all in one place.

1 Import 2 Details 3 Transactions

Portfolio Name *
My Portfolio

Paste Ticker List
AAPL, MSFT, GOOG...

Enter tickers manually OR upload a CSV below.

OR

Upload a CSV file containing a 'ticker' or 'symbol' column.

Select CSV File

dreman.csv

Process File

Back Next

Create New Portfolio

Securely creating a portfolio with AAIi lets you evaluate your holdings all in one place.

1 Import 2 Details 3 Transactions

Portfolio Name *
Dreman Ideas

Paste Ticker List
ABT,DOX,ABCB,CBSH,BAP,WTRG,HWC,JHG,SEIC,PNC,TRV,TFC

Enter tickers manually OR upload a CSV below.

OR

Upload a CSV file containing a 'ticker' or 'symbol' column.

Select CSV File

dreman.csv

Process File

Back Next

Create New Portfolio

Securely creating a portfolio with AAIL lets you evaluate your holdings all in one place.

1

2

3

Import

Details

Transactions

ABCB

+ Add Transaction

Purchase Date

Sell/Buy

Shares

Commission

Price

Jan 22, 2026

buy

-

0

+

0

83.33

ABT

+ Add Transaction

Purchase Date

Sell/Buy

Shares

Commission

Price

Jan 22, 2026

buy

-

0

+

0

111.35

BAP

+ Add Transaction

Purchase Date

Sell/Buy

Shares

Commission

Price

Jan 22, 2026

buy

-

0

+

0

337.64

CBSH

+ Add Transaction

Purchase Date

Sell/Buy

Shares

Commission

Price

Jan 22, 2026

buy

-

0

+

0

55.86

DOX

+ Add Transaction

Holdings

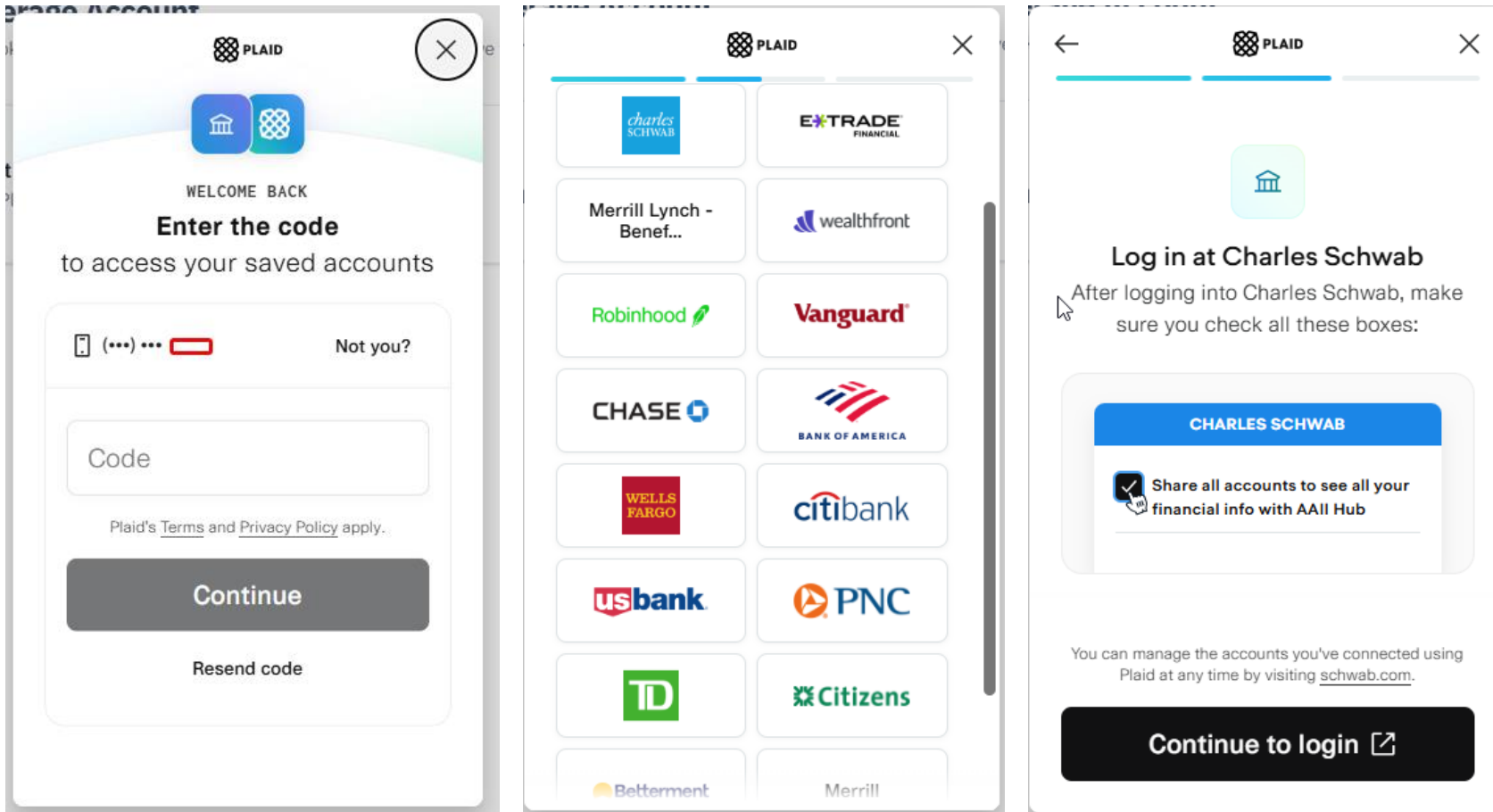
View: My Default

Columns Excel Print + Add Holding

Snapshot Intraday Monthly Gain/Loss Since Purchase Fundamentals My Notes

	↕ Ticker	↕ Name	↕ Current Price	↕ Daily % Change	↕ Shares Held	↕ Market Value	↕ Daily \$ Change	↕ Portfolio Weight	↕ Holding Type	↕ AI
...	+ ABCB	Abbott Laboratories	\$111.35	(7.77%)	1.00	\$111.35	(\$9.38)	10.12%	Stocks	🔔
...	+ DOX	Amdocs Limited	\$83.52	0.81%	1.00	\$83.52	\$0.68	7.59%	Stocks	🔔
...	+ ABCB	Ameris Bancorp	\$83.33	1.54%	1.00	\$83.33	\$1.26	7.57%	Stocks	🔔
...	+ CBSH	Commerce Bancshares, Inc.	\$55.86	1.36%	1.00	\$55.86	\$0.75	5.07%	Stocks	🔔
...	+ BAP	Credicorp Ltd.	\$337.64	1.52%	1.00	\$337.64	\$5.05	30.67%	Stocks	🔔
...	+ WTRG	Essential Utilities, Inc.	\$39.49	0.66%	0.00	\$0.00	\$0.00	0.00%	Stocks	🔔
...	+ HWC	Hancock Whitney Corporation	\$69.66	0.65%	1.00	\$69.66	\$0.45	6.33%	Stocks	🔔
...	+ JHG	Janus Henderson Group plc	\$48.03	0.37%	1.00	\$48.03	\$0.18	4.36%	Stocks	🔔
...	+ SEIC	SEI Investments Company	\$86.67	0.81%	1.00	\$86.67	\$0.70	7.87%	Stocks	🔔
...	+ PNC	The PNC Financial Services Group, Inc.	\$224.67	(0.37%)	1.00	\$224.67	(\$0.83)	20.41%	Stocks	🔔
...	+ TRV	The Travelers Companies, Inc.	\$276.26	1.32%	0.00	\$0.00	\$0.00	0.00%	Stocks	🔔
...	+ TFC	Truist Financial Corporation	\$50.91	1.78%	0.00	\$0.00	\$0.00	0.00%	Stocks	🔔

Importing a Brokerage Account



- Plaid is used to pull in current holdings from a wide array of brokers
- We do not store or see your log-in information
- Plaid is SOC 2 Type II certified and used by thousands of financial institutions with independent audits.
- We request only read access to investment holdings aka no trades, transfers, or writes.
- Users can disconnect anytime, immediately revoking access permanently.

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Step 2 — Select accounts to import

1 account found. Choose which to add to your portfolio.

Import Selected

☒ Shadow Profit Sharing Plan \$24,396.56
29 importable holdings total value

Shadow — Holdings Preview

SYMBOL	NAME	TYPE	QTY	PRICE	VALUE	STATUS
\$CASH			1.00		\$58.30	✓ Import
CTRM			1.75		\$197.75	✓ Import
BOOM			5.29		\$211.60	✓ Import
SGA			1.80		\$283.20	✓ Import
EBF			2.16		\$310.24	✓ Import
LAKE			3.64		\$345.60	✓ Import
SDHC	Smith Douglas Homes Corp. - Ordin...	Equity	25	\$15.11	\$377.75	✓ Import
AMPY	Amplify Energy Corp.	Equity	78	\$5.71	\$445.38	✓ Import
APT	Alpha Pro Tech, Ltd.	Equity	102	\$4.67	\$475.83	✓ Import
KE	Kimball Electronics Inc	Equity	19	\$25.65	\$487.35	✓ Import
NC	Nacco Industries Inc. - Ordinary Sh...	Equity	12	\$51.21	\$614.52	✓ Import
FONR	Fonar Corp.	Equity	34	\$18.60	\$632.40	✓ Import
RCKY	Rocky Brands, Inc	Equity	15	\$42.34	\$635.10	✓ Import

Import Results

1 of 1 account imported successfully

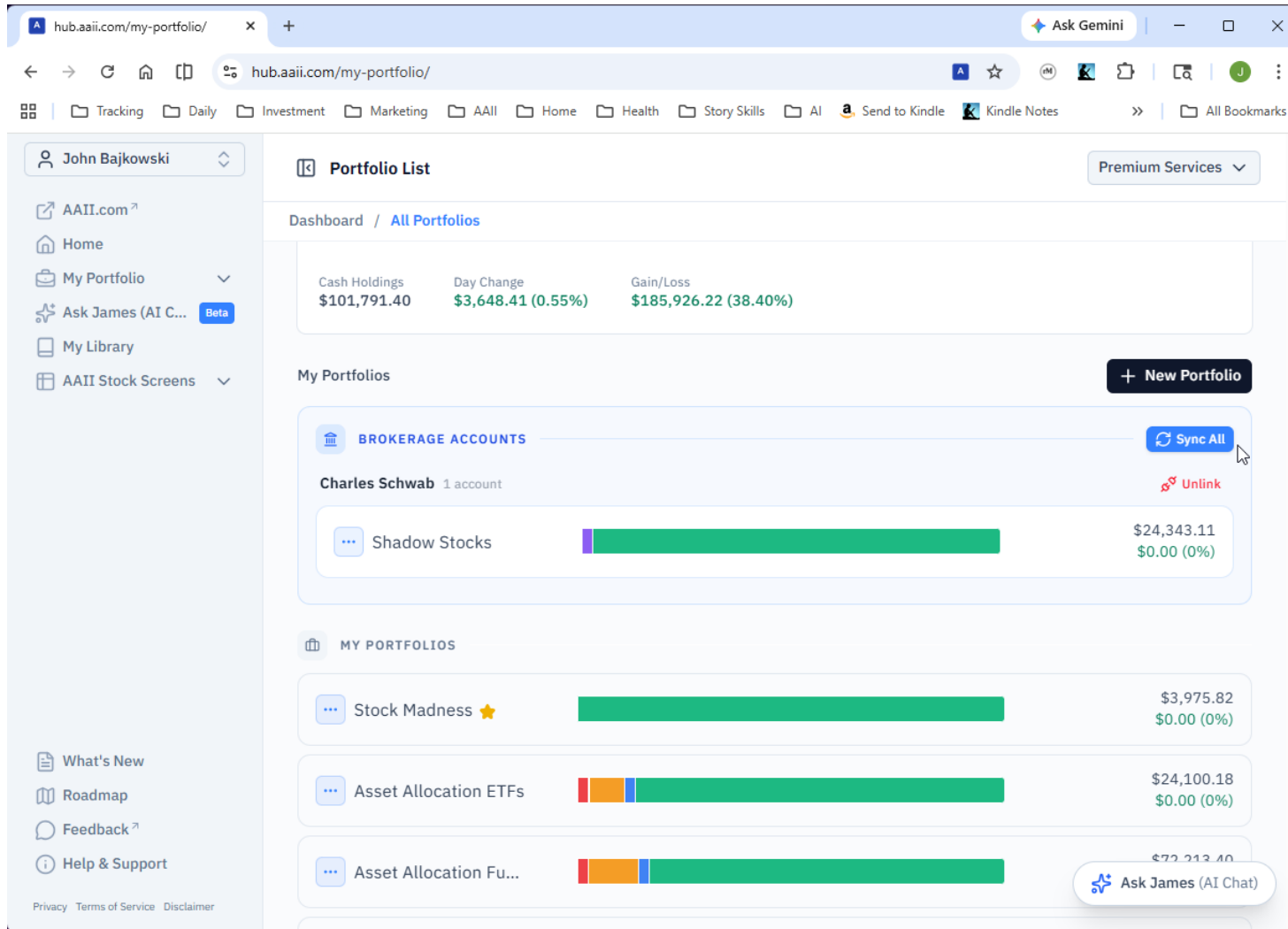
✓ Shadow - 9964 · 29 holdings

Created

Close

Go to My Portfolio

Ask James (AI Chat)



- Sync All
 - Refreshes holdings across all brokerage accounts
- Unlink
 - When a user disconnects their brokerage, they are given two explicit choices:
 - Convert to AAII Portfolios: Holdings data is kept as a regular manual portfolio. Plaid sync is removed but the investment data stays intact for continued use.
 - Delete All Portfolios: All imported holdings and portfolio records are permanently and irreversibly deleted from our database.
 - In both cases, Plaid's access token is immediately revoked and removed—we can no longer access the user's brokerage data.

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Portfolio List

Premium Services

Dashboard / All Portfolios

Charles Schwab 5 accounts

Shadow - 1e47 \$24,363.03 \$0.00 (0%)

Convert to AAI Portfolios
Keep all imported holdings as regular portfolios. Plaid sync will be removed but your data stays.

Delete All Portfolios
Permanently remove all portfolios imported from this brokerage. This cannot be undone.

In both cases, Plaid's access to your brokerage will be revoked. You can reconnect later via "Import from Brokerage".

Cancel Delete & Disconnect

Stock Madness \$3,945.03 \$0.00 (0%)

Asset Allocation ETFs \$24,003.01

Ask James (AI Chat)

Select Portfolio From Side Navigation or Portfolio List

The screenshot shows the AAIi website interface. The left sidebar navigation menu is highlighted with a red box, showing the following options:

- All Portfolios
- My Portfolios
 - Stock Madness
 - Top 50 Held Stocks
 - Shadow - Ideas
 - SSR G3 Ideas
 - Dividend Aristocrats
 - SSR G4
 - SSR G3
 - SSR G1
 - SSR G2
 - DJ 30
 - Asset Allocation ETFs
 - Asset Allocation Fun...
 - Shadow
 - Mixed Assets
- Brokerage Accounts
 - Shadow Stocks

The main content area displays the 'Shadow Stocks' portfolio page. The page title is 'Shadow Stocks'. Below the title, there is a search bar and a list of portfolio options: Shadow Stocks, Asset Allocation ETFs, SSR G1, SSR G2, Top 50 Held Stocks, Stock Madness, and SSR G4. The 'Shadow Stocks' option is selected. The page shows a summary of the portfolio, including a line chart showing performance from April 6 to April 9. The chart shows a steady increase in value, starting around \$23,500 and ending around \$24,000. The text 'Gain/Loss \$23,958.57 (0.00%)' is displayed. Below the chart, there is a section titled 'Holdings'.

Built-in Views

The screenshot shows the AAII Stock Madness portfolio interface. A dropdown menu is open under the 'View:' selector, showing 'Standard Views' and 'Custom Views'. The 'Standard Views' list includes 'My Default' (selected), 'VMQ Stocks', 'SSR', 'DI', 'Growth', and 'Shadow'. The 'Custom Views' list includes 'Company Info'. The main table displays a list of stocks with columns for 'Current Price', 'Daily % Change', 'Shares Held', 'Market Value', and 'Daily \$ Change'. The table is filtered by 'Stock Madness' and shows a list of holdings including BRK.B, CVX, XOM, JNJ, JPM, and MSET.

John Bajkowski

AAII.com

Home

My Portfolio

All Portfolios

My Portfolios

Mixed Assets

Shadow

Asset Allocation Fun...

SSR G3

Asset Allocation ETFs

SSR G1

SSR G2

Top 50 Held Stocks

Stock Madness

SSR G4

SSR G3 Ideas

Shadow - Ideas

Dividend Aristocrats

DJ 30

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Stock Madness

Premium Services

Stock Madness

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Diversification Plus

Insights Plus

Alerts

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Manage Custom Views

Modify Portfolio

Dashboard / All Portfolios / Stock Madness

View: My Default

Columns

Excel

Print

+ Add Holding

Standard Views

My Default

VMQ Stocks

SSR

DI

Growth

Shadow

Custom Views

Company Info

Current Price

Daily % Change

Shares Held

Market Value

Daily \$ Change

BRK.B

CVX

XOM

JNJ

JPM

MSET

Ask James (AI Chat)

Determine Which Data Columns to View

The screenshot shows the AAI Stock Madness web application. The user is logged in as John Bajkowski. The main page displays the 'Stock Madness' portfolio overview. A 'Holdings' table is visible, showing a list of stocks held in the portfolio. A custom column selection menu is open, allowing the user to choose which data columns to display. The table includes columns for Ticker, Company, Held in Model SSR Portfolio (Y/N), 2-Week High(\$), 52-Week Low (\$), and Market Cap (Mil).

Holdings Table Data:

...	Ticker	Company	Held in Model SSR Portfolio (Y/N)	2-Week High(\$)	52-Week Low (\$)	Market Cap (Mil)
...	ABBV	AbbVie Inc.	X	164.39	164.39	-
...	GOOGL	Alphabet Inc.	X	143.03	143.03	-
...	AMZN	Amazon.com, Inc.	X	165.29	165.29	-
...	AAPL	Apple Inc.	X	169.21	169.21	-
...	T	T&T Inc.	X	27.00	29.79	22.95
...	BRK.B	Berkshire Hathaway Inc.	X	486.99	542.07	455.19
...	CVX	Chevron Corporation	X	191.57	214.71	132.04
...	XOM	Exxon Mobil Corporation	X	155.21	176.41	97.80

Compact Mode / Fullscreen

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Portfolio Fullscreen View Compact ☒

View: Shadow Columns Excel Print + Add Holding

Portfolio Holding

↑↓ Ticker	↑ Company	↑↓ Held in Model Shadow Stock Portfolio (Y/N)	↑↓ Current Price(\$)	↑↓ 52-Week High(\$)	↑↓ 52-Week Low(\$)	↑↓ Market-Cap (\$)	Ratio(X)	↑↓ Price-to-E
... + ABBV	AbbVie Inc.	×	\$212.52	\$244.81	\$164.39	\$374,252.40	89.7	-
... + GOOGL	Alphabet Inc.	×	\$318.67	\$349.00	\$143.91	\$3,824,753.10	29.4	9.24
... + AMZN	Amazon.com, Inc.	×	\$232.45	\$258.60	\$165.29	\$2,375,101.20	30.9	5.78
... + AAPL	Apple Inc.	×	\$258.96	\$288.62	\$171.89	\$3,800,947.10	32.8	43.15
... + T	AT&T Inc.	×	\$27.00	\$29.79	\$22.95	\$191,000.30	9.0	1.74
... + BRK.B	Berkshire Hathaway Inc.	×	\$486.99	\$542.07	\$455.19	\$1,035,212.10	-	-
... + CVX	Chevron Corporation	×	\$191.57	\$214.71	\$132.04	\$384,217.40	29.1	2.05
... + XOM	Exxon Mobil Corporation	×	\$155.21	\$176.41	\$97.80	\$650,931.80	23.3	2.52
... + JNJ	Johnson & Johnson	×	\$242.66	\$251.71	\$141.50	\$581,198.40	21.9	7.13
... + JPM	JPMorgan Chase & Co.	×	\$310.65	\$337.25	\$211.00	\$826,043.20	15.4	2.43
... + MSFT	Microsoft Corporation	×	\$371.43	\$555.45	\$353.10	\$2,779,635.70	23.4	7.12
... + NVDA	NVIDIA Corporation	×	\$183.43	\$212.19	\$95.04	\$4,423,086.80	37.2	28.14
... + PFE	Pfizer Inc.	×	\$27.40	\$28.75	\$20.92	\$156,259.10	20.2	1.81
... + TSLA	Tesla, Inc.	×	\$348.03	\$498.83	\$222.79	\$1,288,022.30	317.8	15.67
... + KO	The Coca-Cola Company	×	\$78.08	\$82.00	\$65.35	\$332,668.00	25.4	10.33
... + VZ	Verizon Communications Inc.	×	\$47.48	\$51.68	\$38.39	\$200,807.20	11.8	1.94

Compact Mode ✓
Exit Fullscreen

Views with Plus Require A+/Platinum

The screenshot shows the AAII Stock Madness Grades page. The browser address bar displays 'hub.aaii.com/my-portfolio/113834/grades'. The page features a sidebar with navigation options like 'Home', 'My Portfolio', and 'All Portfolios'. The main content area is titled 'Stock Madness' and includes tabs for 'Overview', 'Grades Plus', 'Diversification Plus', 'Insights Plus', and 'Alerts'. Below these tabs is a breadcrumb trail: 'Dashboard / All Portfolios / Stock Madness / Grades'. The 'Stock Grades' section contains a table with columns for Ticker, Company, Value, Growth, Momentum, Revision, Quality, and Sector. The table lists 15 stocks with their respective grades. A 'Print' button and an 'Excel' button are located to the right of the table. A chat bubble for 'Ask James (AI Chat)' is visible in the bottom right corner.

↑↓ Ticker	↑↓ Company	↑↓ Value	↑↓ Growth	↑↓ Momentum	↑↓ Revision	↑↓ Quality	↑↓ Sector
+ AAPL	Apple Inc.	F	A	C	B	A	Information Technology
+ ABBV	AbbVie Inc.	F	A	D	C	B	Health Care
+ AMZN	Amazon.com, Inc.	F	A	C	C	A	Consumer Discretionary
+ BRK.B	Berkshire Hathaway Inc.	NA	A	D	D	C	Financials
+ CVX	Chevron Corporation	D	B	B	B	C	Energy
+ GOOGL	Alphabet Inc.	F	A	B	B	A	Communication Services
+ JNJ	Johnson & Johnson	F	B	B	C	B	Health Care
+ JPM	JPMorgan Chase & Co.	C	C	C	C	F	Financials
+ KO	The Coca-Cola Company	F	A	C	C	A	Consumer Staples
+ MSFT	Microsoft Corporation	F	A	D	B	A	Information Technology
+ NVDA	NVIDIA Corporation	F	B	B	B	A	Information Technology
+ PFE	Pfizer Inc.	B	B	C	C	A	Health Care
+ T	AT&T Inc.	A	D	C	C	B	Communication Services

Special Views For Each AAI Model Portfolio

The screenshot displays the AAI Portfolio List interface. At the top, there's a 'Portfolio List' header with a search bar containing 'Shadow' and tabs for 'Overview', 'Grades', 'Diversification', 'Insights', 'Alerts', and 'Manage Alerts'. A 'Premium Services' dropdown and a 'Modify Portfolio' button are also visible. Below the header, a breadcrumb trail reads 'Dashboard / All Portfolios / Shadow'. A line chart shows the portfolio's performance over time. The 'Holdings' section features a 'View:' dropdown menu currently set to 'Shadow'. The dropdown menu lists options: 'My Default', 'VMQ Stocks', 'SSR', 'DI', 'Growth', 'Shadow' (selected), and 'ard Corporation'. The main table lists holdings with columns for 'Held in Model Shadow Stock Portfolio (Y/N)', 'Current Price(\$)', '52-Week High(\$)', '52-Week Low(\$)', 'Market-Cap (\$ mil)', 'Price-Earnings Ratio(X)', and 'Price-to-Bo'. The table includes entries for various companies like AMPY, CTRM, CMT, CVLG, BOOM, EBF, ESCA, FONR, FRD, and GILT. An 'Ask James (AI Chat)' button is located at the bottom right of the table.

	↑↓ Held in Model Shadow Stock Portfolio (Y/N)	↑↓ Current Price(\$)	↑↓ 52-Week High(\$)	↑↓ 52-Week Low(\$)	↑↓ Market-Cap (\$ mil)	↑↓ Price-Earnings Ratio(X)	↑↓ Price-to-Bo
DI	✓	\$4.78	\$6.20	\$4.06	\$47.40	13.5	0.75
Growth							
Shadow	✗	\$5.13	\$6.33	\$3.28	\$140.60	-	0.65
ard Corporation							
AMPY	✓	\$4.61	\$6.55	\$2.27	\$193.10	-	0.49
CTRM	✓	\$2.10	\$2.92	\$1.84	\$19.90	-	0.04
CMT	✓	\$19.15	\$22.29	\$12.25	\$163.80	20.7	1.05
CVLG	✓	\$27.02	\$29.47	\$17.46	\$665.30	24.8	1.57
BOOM	✓	\$8.96	\$9.92	\$5.46	\$182.40	-	0.72
EBF	✓	\$19.68	\$22.01	\$16.30	\$494.50	11.8	1.62
ESCA	✓	\$14.37	\$16.99	\$11.41	\$195.90	15.4	1.14
FONR	✓	\$18.69	\$18.86	\$12.00	\$122.40	17.2	0.70
FRD	✓	\$19.40	\$23.50	\$12.24	\$139.30	12.0	
GILT	✓	\$18.32	\$18.39	\$5.30	\$1,295.40	45.1	3.21

Users Can Modify These Special Views

Portfolio List

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Holdings

View: SSR

Columns Excel Print + Add Holding

SSR Group 1 Analysis **SSR Group 2 Analysis** SSR Group 3 Analysis SSR Group 4 Analysis

...	+	Ticker	Company	Held in Model SSR Portfolio (Y/N)	Latest Price (\$)	52-Week High (\$)	P/E (X)	% Rank-Market Cap	P/E (X)	% Rank
...	+	ABT	Abbott Laboratories	X	\$110.81	\$141.23				
...	+	DOX	Amdocs Limited	X	\$83.54	\$95.41				
...	+	ABCB	Ameris Bancorp	X	\$83.41	\$82.33				
...	+	CBSH	Commerce Bancshares, Inc.	X	\$55.86	\$65.59				
...	+	BAP	Credicorp Ltd.	X	\$337.55	\$333.43	\$165.51	\$26,396.00	89	14 32
...	+	WTRG	Essential Utilities, Inc.	X	\$39.55	\$42.37	\$33.38	\$11,101.00	79	16 39
...	+	HWC	Hancock Whitney Corporation	X	\$69.79	\$71.20	\$43.90	\$5,693.00	70	12 25
...	+	JHG	Janus Henderson Group plc	X	\$48.03	\$49.42	\$28.26	\$7,372.00	74	14 31
...	+	SEIC	SEI Investments Company	X	\$86.75	\$93.96	\$64.66	\$10,590.00	79	15 37
...	+	PNC	The PNC Financial Services Group, Inc.	X	\$224.80	\$227.78	\$145.12	\$88,034.00	97	14 33
...	+	TRV	The Travelers Companies, Inc.	X	\$276.54	\$296.85	\$230.43	\$60,818.00	95	
...	+	TFC	Truist Financial Corporation	X	\$50.97	\$51.52	\$33.56	\$63,148.00	95	13 29

Market Cap (Mn) ✓
 % Rank-Market Cap ✓
 % Rank-P/E ✓
 Dividend Yield (%) ✓
 EPS Est % Rev-Last Month Y0 ✓
 EPS Est % Rev-Last Month Y1 ✓
 Liabilities / Assets Q1 Company ✓

Ask James (AI Chat)

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Apr 6

Apr 8

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Add Holding

Est Rev Data

Income Statement Items

PE Comparisons

Price

Sector/Industry % Rank

Shadow Stocks

Stock Madness

+ Create Custom View

	Current Price	Shares	Price Change 13 Week	Price Change 52 Week	P E- Forward E P S Est Y0	P E	Ind. P E	Yield	Sales
...	\$190.57	1	23.22	34.63	19.4	29.1	16	3.70%	(5.6)
...	\$154.62	1	29.05	49.72	23.2	23.3	16	2.60%	(4.5)
...	\$346.45	1	(20.72)	43.36	166.8	317.8	29.1	0.00%	(2.9)
...	\$231.69	1	(8.17)	29.39	28.6	30.9	23.9	0.00%	12.4
...	\$77.99	1	13.93	10.53	24	25.4	25.8	2.70%	1.9
...	\$212.37	1	(5.51)	13.17	14.6	89.7	20.5	3.30%	8.6
...	JNJ Johnson & Johnson	1	17.83	57.47	20.9	21.9	19.3	2.20%	6
...	PFE Pfizer Inc.	1	8.02	19.59	9.3	20.2	19.3	6.30%	(1.6)
...	BRK.B Berkshire Hathaway Inc.	2	(3.87)	(2.79)	23.3	-	14.7		
...	JPM JPMorgan Chase & Co.	1	(7.96)	46.46	14.2	15.4	12.1		

Ask James (AI Chat)

A A I I

American Association of Individual Investors

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hub.aaii.com/my-portfolio/113834/custom-views

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Income Statement	> PE Low Average	3 Add All >
Company Information	> PE Low	5 Add All >
Dates and Periods	> PE Relative Adjusted P/E	1 Add All >
Earnings Estimates	> PE Relative Avg	2 Add All >
Growth Rates	> PE Relative Low-Avg	1 Add All >
Multiples	> PE Relative Valuation	1 Add All >
Price and Share Stati...	+ PE Relative Valuation	
Prices	> PE Relative Valuation % Price	1 Add All >
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Industry Medians		
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View name *

Stock Madness

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SELECTED (17) Clear

- Price Change 13 week
- Price Change 52 week
- PE-Forward EPS Est Y0
- PE
- Ind. PE
- Yield
- Sales-Growth 12m
- Sales-Growth 3yr
- EPS Dil Cont-Growth 12m
- EPS Dil Cont-Growth 3yr
- Return on equity 12m

Custom Views

Allow A+ Investor/Platinum users to organize information to view and or export on their holdings and watchlists

Currently using stock data, but working on adding mutual fund/ETF data

Alerts by Price & Grade Changes

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Daily Alerts

Refresh All

Price (13)

Price Alerts 13

Portfolio DJ 30

COMPANY (TICKER)	PRICE	INTRADAY**	
		\$	%
American Express Company AXP	\$367.38	\$7.77	2.16%
3M Company MMM	\$159.76	\$3.88	2.49%
The Procter & Gamble Company PG	\$150.065	\$4.005	2.74%

Portfolio Shadow

COMPANY (TICKER)	PRICE	INTRADAY**	
		\$	%
Vishay Precision Group, Inc. VPG	\$48.615	\$1.805	3.86%
Titan Machinery Inc. TITN	\$16.855	\$0.645	3.98%

Grade Alerts 6

Reload

Portfolio Shadow

COMPANY	V	G	M	REV	Q	PRICE	\$ CHG	%
DMC Global Inc. BOOM	A	C	B ▲	D	B	\$8.96	\$0.10	1.13%
Covenant Logistics Group, Inc. CVLG	A	A	C	C ▲	B	\$27.02	\$0.46	1.73%
Nortech Systems Incorporated NSYS	C	D	F ▲	NA	D	\$8.40	\$0.05	0.60%
Pangaea Logistics Solutions Ltd. PANL	C	B	A ▲	C	D	\$8.69	\$1.55	21.71%

Portfolio SSR G3

COMPANY	V	G	M	REV	Q	PRICE	\$ CHG	%
Bausch Health Companies Inc. BHC	A	D	D ▲	C	B	\$6.74	\$0.09	1.35%
Pathward Financial, Inc. CASH	A	A	C ▲	C	C	\$79.085	\$1.835	2.38%

AAII Stocks Screens

John Bajkowski

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Performance Risk & Return Yearly Performance Characteristics Grades Power Rankings

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Performance as of: 3/31/2026

Rows: 54

Screen (Favorited)	Stocks Passing	1 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr	20 Yr
★ ADR Screen (141)	18	-2.5%	6.4%	16.8%	6.0%	-3.2%	1.9%	3.0%
★ Buffett: Hagstrom Screen (1221)	30	-5.8%	5.3%	25.8%	14.3%	9.2%	11.6%	11.1%
★ Buffettology: EPS Growth (962)	33	-4.6%	3.3%	38.6%	20.6%	9.8%	14.3%	11.4%
★ Buffettology: Sustainable Growth Screen (1281)	16	-5.2%	-5.9%	24.8%	16.7%	9.7%	16.5%	12.9%
★ Cash Rich Firms Screen (209)	18	-6.7%	-2.6%	5.1%	2.3%	-6.1%	1.3%	1.9%
★ Dividend (High Relative Yield) Screen (734)	36	-4.5%	1.0%	8.5%	10.3%	7.4%	9.2%	7.2%
★ Dogs of the Dow Screen (287)	10	-5.7%	6.5%	18.2%	9.2%			
★ Dogs of the Dow: Low Priced 5 Screen (174)	5	-7.6%	5.5%	12.2%	-0.4%			
★ Dreman Screen (150)	20	-2.7%	0.7%	22.1%	16.7%	3.4%	4.5%	4.0%
★ Dreman With Est Revisions Screen (508)	8	-5.4%	-16.1%	1.1%	13.7%	7.6%		

Try asking:
"Which stocks in my portfolio have the highest Value Grade?"

Ask James (AI Chat)

Risk and Return

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Screens

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All Strategies

Performance Risk & Return Yearly Performance Characteristics Grades Power Rankings

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Risk & Return as of: 3/31/2026

Rows: 54

Screen (Favorited)	Risk Index	Risk Adj Ret	Incp Ret	1 Mo	1 Yr	5 Yr	10 Yr	Bull Mkt	Bear Mkt	Best Mo	Worst M
Buffettology: EPS Growth (962)	1.27	11.7%	12.3%	-4.0%	38.0%	7.6%	14.3%	134.0%	-27.4%	10.0%	-20.6%
Buffettology: Sustainable Growth Screen (1281)	1.31	12.6%	13.3%	-5.2%	24.8%	9.7%	16.5%	125.4%	-22.8%	17.7%	-20.4%
Cash Rich Firms Screen (209)	1.36	5.0%	6.4%	-6.7%	5.1%	-6.1%	1.3%	28.7%	-35.4%	19.8%	-20.7%
Dividend (High Relative Yield) Screen (734)	1.09	8.7%	8.9%	-4.5%	8.5%	7.4%	9.2%	67.1%	-10.9%	15.5%	-21.3%
Dogs of the Dow Screen (287)	1.15	3.2%	4.1%	-5.7%	18.2%	3.9%	5.2%	70.6%	-18.9%	17.1%	-23.4%
Dogs of the Dow: Low Priced 5 Screen (174)	1.41	-0.7%	2.5%	-7.6%	12.2%	-2.2%	0.4%	33.1%	-21.4%	27.6%	-34.8%
Dreman Screen (150)	1.29	7.7%	8.3%	-2.7%	22.1%	3.4%	4.5%	78.2%	-31.1%	23.9%	-31.4%
Dreman With Est Revisions Screen (508)	1.47	13.0%	14.3%	-5.4%	1.1%	7.6%	11.1%	121.3%	-23.8%	30.9%	-34.0%
Driehaus Revised Screen (418)	2.26	13.2%	16.9%	23.3%	33.2%	9.5%	10.2%	44.9%	-17.7%	85.8%	-54.9%
Driehaus Screen (261)	2.27	11.0%	12.0%	-12.6%	46.0%	4.6%	9.3%	129.1%	-23.1%	51.3%	-34.3%
Dual Cash Flow Screen (222)	1.56	10.8%	11.2%	-4.7%	27.6%	3.2%	8.8%	104.9%	-32.7%	34.7%	-26.5%
Est Rev: Down 5% Screen (99)	1.94	-5.7%	2.0%	-3.0%	48.3%	-5.5%	4.8%	76.3%	-38.4%	33.5%	-30.5%
Est Rev: Lowest 30 Down (67)	2.26	-7.4%	2.4%	1.6%	84.6%	-0.4%	6.6%	98.2%	-38.8%	43.0%	-29.9%

Ask James (AI Chat)

Annual Performance To Understand Trends

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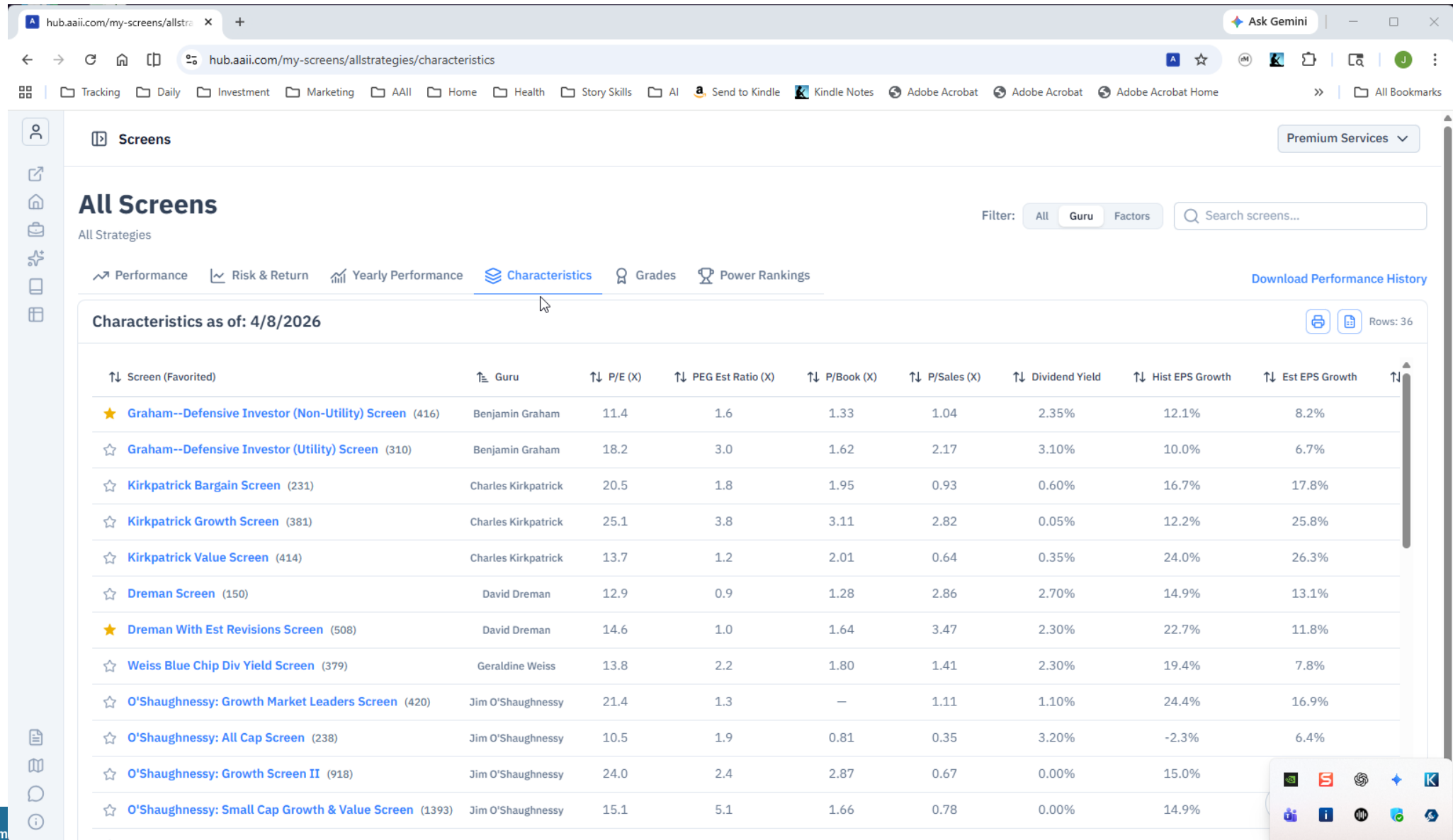
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Yearly Performance as of: 3/31/2026 Rows: 54

Screen (Favorited)	Risk Index	Risk-Adj Ret	Incp Ret	2026	2025	2024	2023	2022	2021
★ Value on the Move--PEG With Hist Growth Screen (442)	1.16	13.1%	13.6%	20.3%	15.0%	31.3%	23.0%	-18.0%	27.3%
☆ Driehaus Revised Screen (418)	2.26	13.2%	16.9%	18.1%	-12.3%	10.4%	35.8%	-12.6%	50.9%
☆ Kirkpatrick Growth Screen (381)	1.94	12.3%	14.3%	12.8%	23.2%	44.9%	14.2%	-7.6%	17.0%
☆ O'Shaughnessy: Tiny Titans Screen (1870)	2.04	17.9%	25.9%	12.0%	51.3%	47.7%	29.3%	13.0%	61.9%
☆ Graham--Defensive Investor (Utility) Screen (310)	1.04	6.9%	7.0%	11.1%	23.2%	12.3%	-8.4%	2.1%	8.8%
☆ Est Rev: Lowest 30 Down (67)	2.26	-7.4%	2.4%	10.1%	46.0%	-9.0%	22.4%	-38.2%	-9.5%
☆ Kirkpatrick Bargain Screen (231)	1.41	4.9%	6.5%	9.8%	17.3%	4.6%	34.4%	-21.4%	9.1%
☆ Lynch Screen (288)	1.24	9.9%	10.0%	8.5%	10.1%	12.8%	24.0%	10.5%	16.9%
★ Stock Market Winners Screen (392)	1.38	13.3%	14.4%	8.4%	-1.8%	34.3%	3.3%	-23.5%	-9.0%
☆ O'Shaughnessy: All Cap Screen (238)	1.6	9.4%	9.7%	8.0%	3.3%	-8.2%	19.1%	-22.9%	36.7%
☆ O'Neil's CAN SLIM Screen (814)	1.89	13.7%	16.9%	7.0%	-10.9%	39.3%	18.2%	-15.8%	52.0%
☆ Dogs of the Dow Screen (287)	1.15	3.2%	4.1%	6.5%	20.6%	-3.6%	3.1%	-4.0%	1.0%

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Characteristics of Companies Passing Each Screen



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Characteristics as of: 4/8/2026 Rows: 36

Screen (Favorited)	Guru	P/E (X)	PEG Est Ratio (X)	P/Book (X)	P/Sales (X)	Dividend Yield	Hist EPS Growth	Est EPS Growth
★ Graham--Defensive Investor (Non-Utility) Screen (416)	Benjamin Graham	11.4	1.6	1.33	1.04	2.35%	12.1%	8.2%
☆ Graham--Defensive Investor (Utility) Screen (310)	Benjamin Graham	18.2	3.0	1.62	2.17	3.10%	10.0%	6.7%
☆ Kirkpatrick Bargain Screen (231)	Charles Kirkpatrick	20.5	1.8	1.95	0.93	0.60%	16.7%	17.8%
☆ Kirkpatrick Growth Screen (381)	Charles Kirkpatrick	25.1	3.8	3.11	2.82	0.05%	12.2%	25.8%
☆ Kirkpatrick Value Screen (414)	Charles Kirkpatrick	13.7	1.2	2.01	0.64	0.35%	24.0%	26.3%
☆ Dreman Screen (150)	David Dreman	12.9	0.9	1.28	2.86	2.70%	14.9%	13.1%
★ Dreman With Est Revisions Screen (508)	David Dreman	14.6	1.0	1.64	3.47	2.30%	22.7%	11.8%
☆ Weiss Blue Chip Div Yield Screen (379)	Geraldine Weiss	13.8	2.2	1.80	1.41	2.30%	19.4%	7.8%
☆ O'Shaughnessy: Growth Market Leaders Screen (420)	Jim O'Shaughnessy	21.4	1.3	—	1.11	1.10%	24.4%	16.9%
☆ O'Shaughnessy: All Cap Screen (238)	Jim O'Shaughnessy	10.5	1.9	0.81	0.35	3.20%	-2.3%	6.4%
☆ O'Shaughnessy: Growth Screen II (918)	Jim O'Shaughnessy	24.0	2.4	2.87	0.67	0.00%	15.0%	
☆ O'Shaughnessy: Small Cap Growth & Value Screen (1393)	Jim O'Shaughnessy	15.1	5.1	1.66	0.78	0.00%	14.9%	

Characteristics of Companies Passing Each Screen

Screens

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Grades as of: 4/8/2026

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Rows: 54

Screen (Favorited)	Value Score	Value Grade	Growth Score	Growth Grade	Momentum Score	Momentum Grade	EPS Revisions Score	EPS R
☆ O'Shaughnessy: All Cap Screen (238)	85	A	51	C	47	C	45	
★ Piotroski: High F-Score Screen (310)	89	A	57	C	47	C	47	
★ Price-to-Free-Cash-Flow Screen (587)	88	A	60	C	32	D	45	
☆ Schloss Screen (90)	86	A	5	F	4	F	46	
☆ O'Shaughnessy: Growth Market Leaders Screen (420)	73	B	95	A	93	A	80	
☆ ADR Screen (141)	67	B	57	C	67	B	48	
☆ Fisher (Philip) Screen (224)	71	B	91	A	57	C	38	
☆ Fundamental Rule of Thumb Screen (227)	70	B	32	D	39	D	58	
★ Graham--Defensive Investor (Non-Utility) Screen (416)	78	B	60	C	38	D	41	
☆ Kirkpatrick Bargain Screen (231)	61	B	58	C	85	A	63	
☆ Kirkpatrick Value Screen (414)	75	B	46	C	91	A	72	
☆ Lynch Screen (288)	69	B	54	C	38	D	46	

Ask James (AI Chat)

Quick Sorting of AAI Screens with Basic Background Info

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Screens Premium Services

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Screen Power Rankings

Ranked By: Risk-Adjusted Return as of 4/8/2026

Follow strategies inspired by the teaching of investment guru Jim O'Shaughnessy. This screen was developed by investment guru Jim O'Shaughnessy.

#1

GURU STRATEGY

O'Shaughnessy: Tiny Titans

Risk-Adjusted Return:

Factors: Value, Size, Momentum

TOP STOCKS: AGEN AMTX AP AYTU BAER View all 25 stocks

DATA AS OF 4/8/2026

Our formula to the O'Shaughnessy: Tiny Titans Screen

#2

FACTOR STRATEGY

Est Rev: Up 5% Screen

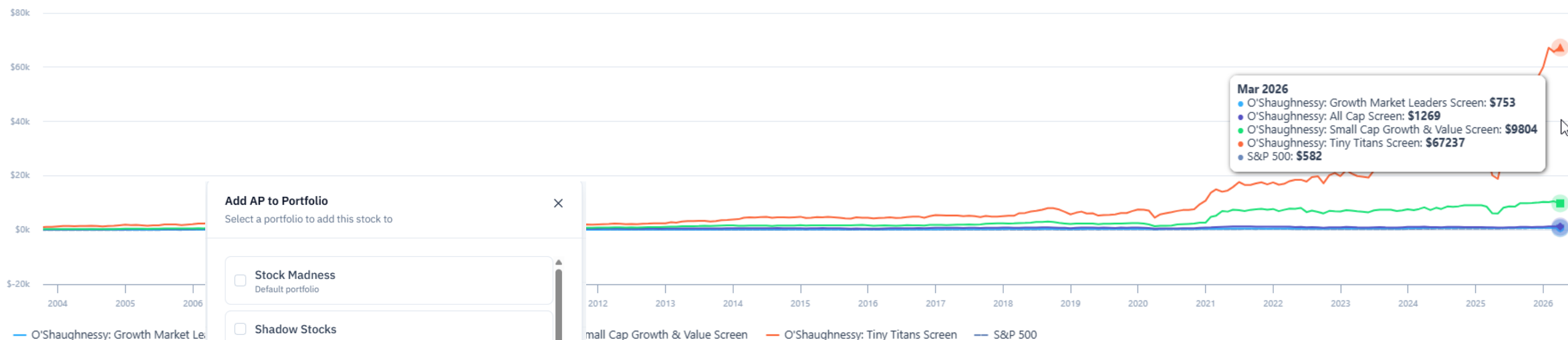
Risk-Adjusted Return: 17.2%

Factors: Earnings Estimates

TOP STOCKS: ALEC APA APYX AVGO BCYC View all 24 stocks

Ask James (AI Chat)

Year	O'Shaughnessy's Growth Market Leverage
2004	\$10,000
2005	\$10,000
2006	\$15,000



Ticker ↑↓	Company Name
AP	Ampco-Pitts
KORE	KORE Group
CVGI	Commercial
CMTL	Comtech Te
SHIM	Shimmick C
AYTU	Aytu BioPha

- ☐ **Stock Madness**
Default portfolio
- ☐ **Shadow Stocks**
- ☐ **Top 50 Held Stocks**
- ☐ **Shadow - Ideas**
- ☐ **SSR G3 Ideas**
- ☐ **Dividend Aristocrats**
- ☐ **SSR G3**
- ☐ **SSR G4**
- ☐ **SSR G1**

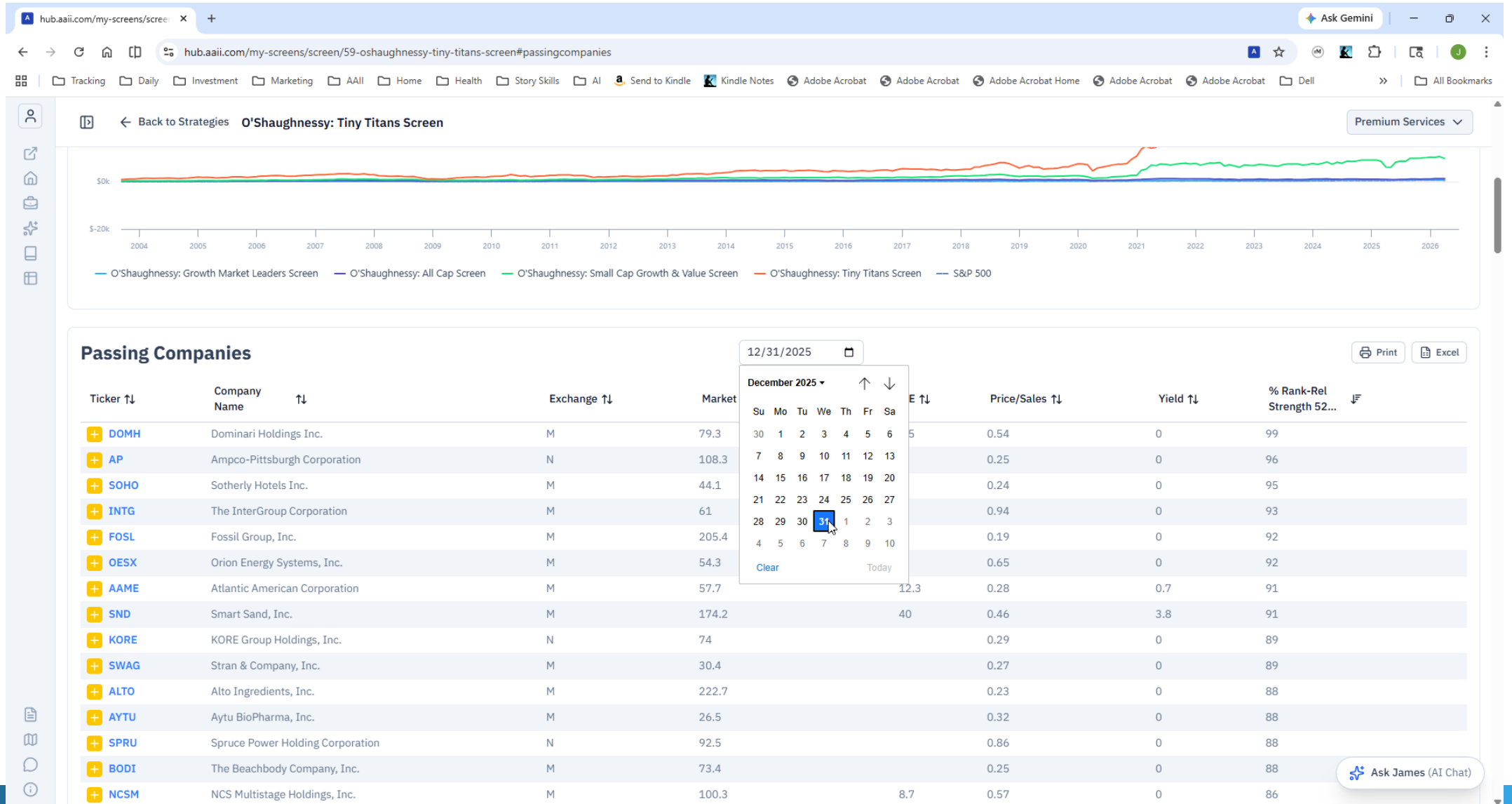
04/08/2026 

Print Excel

Change ↑↓	Market Cap Q1 ↑↓	PE ↑↓	Price/Sales ↑↓	Yield ↑↓	% Rank-Rel Strength 52w... ⌵
	153.1		0.35	0	% Rank-Rel Strength 52 week
	160.6		0.63	0	97
	127.7		0.19	0	96
	116		0.24	0	94
	133.9		0.26	0	93
	28.6		0.34	0	92

 Ask James (AI Chat)

View Which Companies Passed the Screen On a Specific Day



My Screens

The screenshot shows the 'My Screens' page on the AAII website. The browser address bar shows 'hub.aaii.com/my-screens'. The page has a sidebar on the left with navigation links: John Bajkowski (user), AAII.com, Home, My Portfolio, Ask James (AI Chat) (Beta), My Library, and AAII Stock Screens. The main content area is titled 'My Screens' and includes a sub-header 'As of Apr 9, 2026, explore performance and stocks passing your screening strategies.' Below this are tabs for 'Performance' (selected), 'Stocks Passing My Screens', 'Grades', 'My Stocks Passing Any Screens', and 'Stocks Passing Multiple Screens'. The 'Performance' tab displays a table of various stock screening strategies with their performance metrics.

Strategy	V	G	M	S	EE	Y	Q	I	O	YTD (%)	3 Yr (%)	5 Yr (%)	10 Yr (%)
★ Graham--Defensive Investor (Non-Utility) Screen	V	G	M	S	EE	Y	Q	I	O	0.5%	-0.3%	0.6%	4.5%
★ Lakonishok Screen	V	G	M	S	EE	Y	Q	I	O	3.4%	18.4%	8.0%	13.5%
★ Neff Screen	V	G	M	S	EE	Y	Q	I	O	-0.5%	11.9%	6.4%	8.9%
★ Piotroski: High F-Score Screen	V	G	M	S	EE	Y	Q	I	O	-1.1%	2.5%	-5.8%	-4.6%
★ Price-to-Free-Cash-Flow Screen	V	G	M	S	EE	Y	Q	I	O	3.5%	10.7%	7.2%	9.1%
★ Templeton Screen	V	G	M	S	EE	Y	Q	I	O	-8.6%	14.8%	8.9%	7.9%
★ Value on the Move--PEG With Est Growth Screen	V	G	M	S	EE	Y	Q	I	O	4.6%	37.2%	18.6%	10.7%
★ Value on the Move--PEG With Hist Growth Screen	V	G	M	S	EE	Y	Q	I	O	20.3%	29.1%	14.8%	13.1%
★ Wanger (Revised) Screen	V	G	M	S	EE	Y	Q	I	O	-5.5%	34.9%	18.7%	
★ Stock Market Winners Screen	V	G	M	S	EE	Y	Q	I	O	9.4%	10.0%	2.6%	5.9%

List of Stocks Passing Your Screens

John Bajkowski

AAll.com

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As of Jan 22, 2026, explore performance and stocks passing your screening strategies.

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Stocks Passing Multiple Screens

Stocks Passing My Screens

Buffett: Hagstrom Screen

(30 stocks)

↑↓ Ticker	↑↓ Company	↑↓ P/E (X)	↑↓ P/EPS Gr (X)	↑↓ P/B (X)	↑↓ P/S (X)	↑↓ Yield (%)	↑↓ Hist EPS Gr (%)	↑↓ Est LT EPS Gr (%)	↑↓ Mkt Cap (\$M)	↑↓ 52w RS (%)	↑↓ Holdings Avg #	↑↓ Turn
+ ANET	Arista Networks, Inc.	48.40	1.90	13.50	18.90	0.00%	30.9%	13.90%	\$160,294	-7.5%	30	14.80%
+ CASY	Casey's General Stores, Inc.	38.50	1.90	6.10	1.40	0.40%	30.9%	13.90%	\$23,182	39.3%	30	14.80%
+ CVCO	Cavco Industries, Inc.	28.70	1.90	5.00	2.60	0.00%	30.9%	13.90%	\$5,443	27.5%	30	14.80%
+ FIX	Comfort Systems USA, Inc.	48.70	1.90	18.10	4.90	0.20%	30.9%	13.90%	\$40,402	98.7%	30	14.80%
+ CPRT	Copart, Inc.	25.30	1.90	4.20	8.60	0.00%	30.9%	13.90%	\$39,989	-36.7%	30	14.80%
+ DECK	Deckers Outdoor Corporation	15.10	1.90	6.00	2.90	0.00%	30.9%	13.90%	\$14,857	-57.6%	30	14.80%
+ DRD	DRDGOLD Limited	25.00	1.90	6.30	0.40	1.30%	30.9%	13.90%	\$3,151	241.5%	30	14.80%
+ EME	EMCOR Group, Inc.	28.50	1.90	9.50	2.00	0.10%	30.9%	13.90%	\$31,726	22.0%	30	14.80%
+ FBP	First BanCorp.	10.80	1.90	1.80	3.90	3.30%	30.9%	13.90%	\$3,464	-2.1%	30	14.80%
+ GRMN	Garmin Ltd.	25.20	1.90	4.60	5.70	1.80%	30.9%	13.90%	\$39,346	-17.3%	30	14.80%
+ LOPE	Grand Canyon Education, Inc.	24.20	1.90	6.60	4.70	0.00%	30.9%	13.90%	\$4,987	-7.4%	30	14.80%
+ GRBK	Green Brick Partners, Inc.	9.60	1.90	1.80	1.50	0.00%	30.9%	13.90%	\$3,181	6.4%	30	14.80%
+ IESC	IES Holdings, Inc.	31.60	1.90	10.70	2.80	0.00%	30.9%	13.90%	\$9,454	61.2%	30	14.80%
+ KNSL	Kinsale Capital Group, Inc.	19.90	1.90	5.00	5.20	0.20%	30.9%	13.90%	\$9,427	-19.0%	30	14.80%
+ MHO	M/I Homes, Inc.	8.10	1.90	1.10	0.80	0.00%	30.9%	13.90%	\$3,618	-12.4%	30	14.80%

Ask James (AI Chat)

List of Your Stocks Passing Any Screens

The screenshot shows the AAII My Screens interface. The left sidebar contains navigation links: John Bajkowski, AAII.com, Home, My Portfolio, Ask James (AI Chat), My Library, AAII Stock Screens, What's New, Roadmap, Feedback, and Help & Support. The main content area is titled "My Screens" and includes a sub-header "As of Apr 9, 2026, explore performance and stocks passing your screening strategies." Below this is a tabbed interface with "My Stocks Passing Any Screens" selected. The table lists the following stocks:

↑↓ Ticker	↑↓ Company	↑↓ # Screens	Screens	↑↓ Portfolio(s)
+ AAL	American Airlines Group Inc.	1	☆ Est Rev: Lowest 30 Down	SSR G3 Ideas
+ AAPL	Apple Inc	1	☆ P/E Relative Screen	Mixed Assets DJ 30 Top 50 Held Stocks Stock Madness
+ ADBE	Adobe Inc	1	★ Neff Screen	Mixed Assets Top 50 Held Stocks
+ ADM	Archer-Daniels-Midland Co	1	★ Lakonishok Screen	Dividend Aristocrats
+ ADP	Automatic Data Processing Inc	1	☆ P/E Relative Screen	Dividend Aristocrats
+ ALB	Albemarle Corporation	2	☆ Est Rev: Top 30 Up ☆ Kirkpatrick Growth Screen	Divi

An "Ask James (AI Chat)" button is visible in the bottom right corner of the interface.

Stocks Passing Multiple Screens

The screenshot shows the AAII.com 'My Screens' interface. The browser address bar is 'hub.aaii.com/my-screens'. The user is logged in as John Bajkowski. The page title is 'My Screens' with a subtitle 'As of Apr 9, 2026, explore performance and stocks passing your screening strategies.' There are tabs for 'Performance', 'Stocks Passing My Screens', 'Grades', 'My Stocks Passing Any Screens', and 'Stocks Passing Multiple Screens' (which is selected). Below the tabs, there's a section 'Stocks Passing Multiple Screens' with a filter 'Minimum Amount of Screens Passed: 5'. It states '10 stocks pass at least 5 screens.' and 'Data as of Apr 9, 2026'. A table lists the stocks, with 'AFYA' (Afya Limited) highlighted. The table has columns: Ticker, Company, # Screens, and Screens. The 'Screens' column lists various screening criteria.

↑↓ Ticker	↑↓ Company	↑↓ # Screens	Screens
+	AFYA	6	☆ Buffettology: EPS Growth ☆ Buffettology: Sustainable Growth Screen ☆ Lynch Screen ☆ Muhlenkamp Screen ★ Price-to-Free-Cash-Flow Screen ★ Templeton Screen ☆ Est Rev: Top 30 Up

Development Roadmap

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The Future: 2026 Development Roadmap

A living roadmap to track AAI's Investor Hub's future development.

Major Release

Q1 2026 — The Intelligence Update 🚀

We're introducing three of our most requested features to kick off 2026.

Highlights

- **Brokerage Connect (Auto-Import)** — Securely link accounts from major brokers; auto-import holdings & tax lots.
- **AAI AI Assistant (Beta)** — Ask the Hub's built-in AI insights about your actual portfolio.
- **Custom View Builder** — Build and save custom data views and table layouts.
- **PWA Support (TBD*)** — Installable Hub with offline access.



Product Team
Investor Hub

Feature Update

Q2 2026 — Connected Content 🔗

Portfolio data now communicates with research and newsletter systems.

New Features

Webinar Offer For Attendees

Visit: **www.aaii.com/aplus-webinar** to get \$50 off a one-year subscription to A+ Investor (regularly priced at \$199).

With you're A+ Investor purchase, you get access to:

- Custom Stock Screener
- 50+ Pre-Built Stock Screens
- A-F Stock Grades & Stock Evaluator pages
- Mutual Fund & ETF Screeners
- The newly redesigned My Portfolio+
- AAIi Investor Hub
- And more!

SCAN ME





Questions?

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