



A⁺ Investor

Inside the New AAII Investor Hub & My Portfolio

January 22, 2026

John Bajkowski
johnb@aaii.com

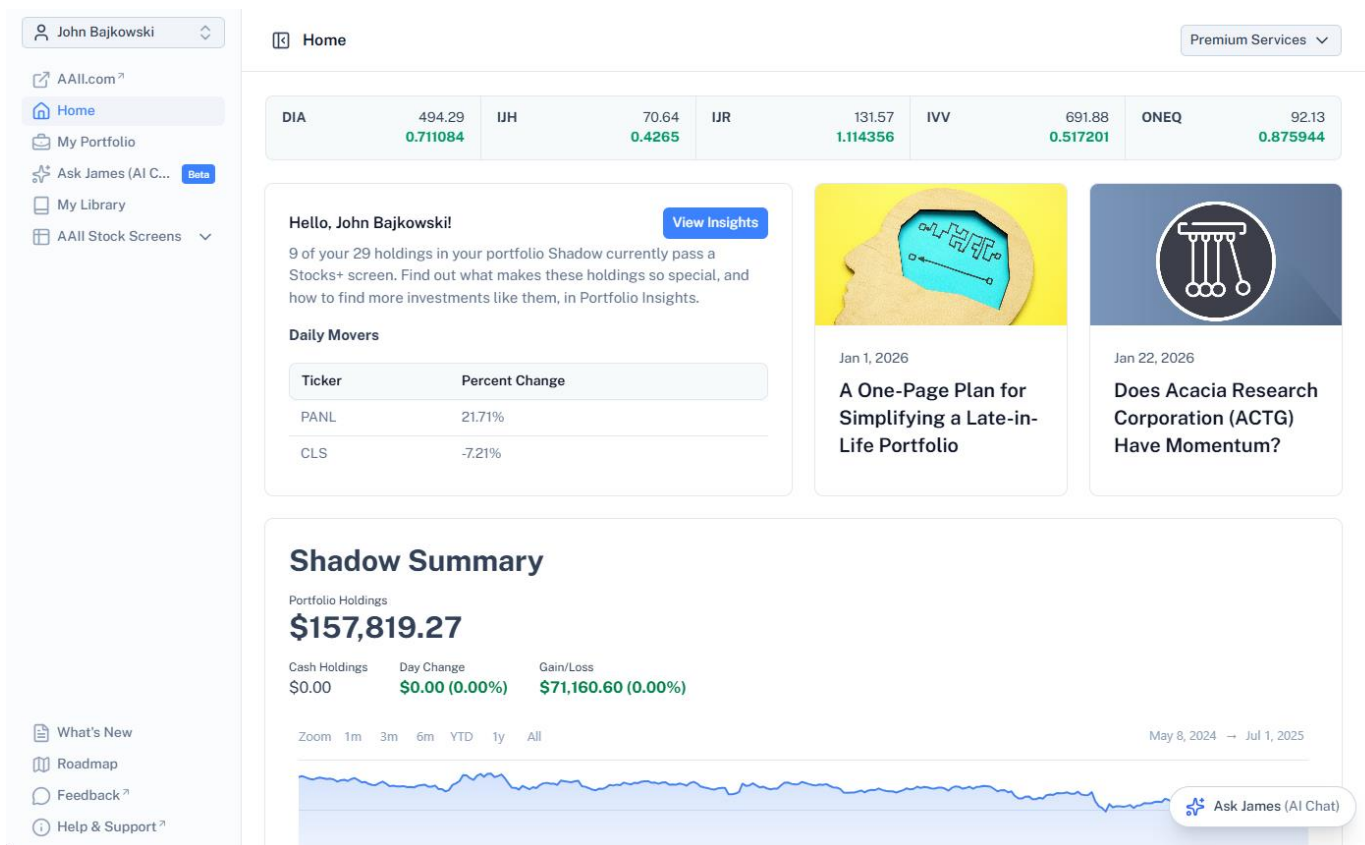
AAII.com is always evolving



AAII Investor Hub

Establish a new central location for AAII members to access key educational and investment research resources

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



- Side panel offers quick access to major sections of the hub
 - AAII.com
 - Home
 - My Portfolio
 - Ask James
 - My Library
 - AAII Stock Screens

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

Home

Premium Services

DIA494.290.711084

IJH70.640.4265

IJR131.571.114356

IVV691.880.517201

ONEQ92.130.875944

Hello, John Bajkowski

View Insights

9 of your 29 holdings in your portfolio Shadow currently pass a Stocks+ screen. Find out what makes these holdings so special, and how to find more investments like them, in Portfolio Insights.

Daily Movers

Ticker	Percent Change
PANL	21.71%
CLS	-7.21%

Shadow Summary

Portfolio Holdings

\$157,819.27

Cash Holdings\$0.00Day Change\$0.00 (0.00%)Gain/Loss\$71,160.60 (0.00%)

Zoom 1m 3m 6m YTD 1y All

A One-Page Plan for Simplifying a Late-in-Life Portfolio

Jan 1, 2026

Jan 22, 2026

Portfolio List

Premium Services

Shadow

OverviewGrades PlusDiversification PlusInsights PlusAlertsManage Alerts

Modify Portfolio

Dashboard / All Portfolios / Shadow / Insights

Total Securities Following29

Stocks Pass a Stocks+ Screen9

Grades B or Greater61 of 145

Fund/ETF Insights0

Insights Summary

The Dow Jones industrial average has increased by 0.3% since the close on Jan 16, 2026. Remember that short-term market fluctuations can be misleading; adopting a long-term perspective is essential to greater success. Your best-performing security over the last 10 years is GILT (GILT), which has an annualized price gain (excluding dividends) of 16.79%.

Add BOOM to Portfolio

Select a portfolio to add this stock to

☒ ShadowDefault portfolio

☐ Growth Ideas 26-01-14

☐ SSR G4 - Ideas 12/17

☐ Wanger Stocks

☐ S&P MidCap 400

☐ Lots of fun

☐ Shadow - Ideas

Stocks+ Screens Overview

9 of your 29 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	Strategy 10-Year Return
+ BOOM Price-to-Sales Screen	4.9%	9.5%
+ EBF Magic Formula Screen	0.0%	5.7%
+ FRD Insider Net Purchases Screen	14.1%	-7.0%
+ FRD O'Shaughnessy: Tiny Titans Screen	14.1%	28.7%
+ KE O'Shaughnessy: Small Cap Growth & Value Screen	10.5%	
+ MG		

Ask James (AI Chat)

American Association of Individual Investors

5



Next section highlights the favorited portfolio with other portfolios and their allocations

AAII Investor Hub visually breaks down the allocations of each of your portfolios. Hovering over the bar to the right of each portfolio's name shows you the percentage you have allocated to domestic stocks, foreign stocks, bonds and cash. It's a quick way to determine how diversified or concentrated your portfolio is.

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Premium Services

Recommended For You

Jan 1, 2026

A One-Page Plan for Simplifying a Late-in-Life Portfolio

AAII's PRISM Wealth-Building Process provides a framework for thinking through what simplification looks like for you.

Jan 22, 2026

Does Acacia Research Corporation (ACTG) Have Momentum?

With data as of January 21, 2026, we examine if Acacia Research Corporation(ACTG) is consistently building momentum based on AAI's A+ Investor Momentum and Value Scores and Grades.

Jan 22, 2026

Does Rapid Micro Biosystems, Inc. (RPID) Have Momentum?

With data as of January 21, 2026, we examine if Rapid Micro Biosystems, Inc.(RPID) is consistently building momentum based on AAI's A+ Investor Momentum and Value Scores and Grades.

Jan 15, 2026

Stock Market Returns Following Streaks of Double-Digit Gains

Large-cap stocks realized double-digit gains for a third consecutive year in 2025.

Jan 8, 2026

The New Features in Our Rebuilt My Portfolio

The completely rebuilt My Portfolio is more intuitive, with several new features and a modern look.

Ask James (AI Chat)

- Next section on highlights recent articles

Home

Premium Services

third consecutive year in 2025.

intuitive, with several new features and a modern look.

Screens Performance

View My Screens

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	-1.6%	3.1%	4.5%	5.4%
Lakonishok Screen	V	G	M	S	EE	Y	Q	I	O	25.7%	18.4%	10.7%	13.3%
Neff Screen	V	G	M	S	EE	Y	Q	I	O	13.0%	16.4%	11.0%	8.4%
Piotroski: High F-Score Screen	V	G	M	S	EE	Y	Q	I	O	-1.1%	3.3%	-0.7%	-4.3%
Price-to-Free-Cash-Flow Screen	V	G	M	S	EE	Y	Q	I	O	15.6%	9.9%	14.1%	9.3%

My Library

View Library

Jan 9, 2026

Choosing the Right Stock Screen for Your Investing Strategy

A well-designed screen can provide you with a preliminary list of stocks that hold promise.

Jan 9, 2026

2025 Review of AAI Stock Screens: Wanger's Zebras Break From the Herd

Seventy-eight percent of the stock screens AAI tracks posted gains during 2025, with an average gain of 14.7%.

Aug 14, 2025

An Intro to Moving Averages: Popular Technical Indicators

In essence, moving averages are "bending trendlines." They are popular because of their relative simplicity and their ability to confirm a trend or announce the reversal of a trend.

Jun 10, 2025

Tracking the Smart Money: Screening for Insider Activity

AAI Stock Screens: Who else better knows the future prospects of a company than the insiders? While it would be foolish to base buy and sell decisions solely on insider data, it is useful to know what the smart money is up to. AAI's insider

Feb 24, 2025

Shareholder Yield Works on Wall Street as a Value Measure

Faber's shareholder yield approach has the potential benefit of investing in classic value companies that are also buying back their stock and reducing their debt.

Ask James (AI Chat)

- Bottom sections of Home page proved a quick glance of saved AAI Stock Screen and Saved AAI articles

My Portfolio Tool

- Keep track of your holdings
 - Stocks, mutual funds and ETFs
 - Cash and bond holding values
- Track AAII stock, mutual fund and ETF ideas
- Evaluate your portfolio holdings
 - Stock and mutual fund grades
- Assess, adjust and control your risk
 - Make smarter asset allocation decisions
 - Diversification Analyzer
- Portfolio Insights

Major Changes

- **Customized Views:** Control data that displayed in each of your portfolio holdings tables. Clicking on the Columns drop-down menu on the right side of the Holdings page gives you the option of including or hiding specific data points.
- **Model Portfolio Views:** This customized view makes it easy to analyze your portfolio using the same criteria used to analyze the Model Shadow Stock Portfolio. This view includes valuation data, momentum data and, of course, market capitalization. There are also a few hidden gems in this view.

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.
- **Import Holdings:** In response to member feedback, we are adding the ability to import holding using a CSV spreadsheet file.
 - Full integration with brokerage accounts is coming soon.
- **Analyze Your Portfolios Offline (Coming Soon):** You will soon be able to analyze your portfolios offline. Simply load your portfolios while you are connected to the internet and keep your browser window open. Any changes you make to your portfolios while offline will be synced once you are online.

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
...	ABT	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	

Select Portfolio From Portfolio List

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Search...

Mixed Assets

Shadow

Asset Allocation Funds

SSR G3

SSR G1

Asset Allocation ETFs

Growth Investing

Gain/Loss
\$71,161.69 (0.00%)

Zoom 1D 1W 1M 3M AIL



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	↑↓ Alerts
APT	Alpha Pro Tech, Ltd.	\$4.75	3.69%	102.00	\$484.40	\$17.24	0.31%	Stocks	
AVD	American Vanguard Corporation	\$5.13	3.85%	58.00	\$297.54	\$11.02	0.19%	S	
AMPY	Amplify Energy Corp.	\$4.63	(3.04%)	770.00	\$3,561.25	(\$111.65)	2.26%	Stocks	

Ask James (AI Chat)

Determine Which Data Columns to View

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Print

+ Add Holding

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Monthly

Gain/Loss Since Purchase

Fundamentals

My Notes

Ticker	Name	Current Price	Daily % Change	Shares Held	Market Value	Portfolio Weight	Holding Type	Alerts	
APT	Alpha Pro Tech, Ltd.	\$4.75	3.69%	102.00	\$484.40	0.31%	Stocks		
AVD	American Vanguard Corporation	\$5.13	3.85%	58.00	\$297.54	0.19%	Stocks		
AMPY	Amplify Energy Corp.	\$4.63	(3.04%)	770.00	\$3,561.25	2.26%	Stocks		
CTRM	Castor Maritime Inc.	\$2.10	1.94%	113.00	\$237.29	0.15%	Stocks		
CMT	Core Molding Technologies, Inc.	\$19.15	0.10%	500.00	\$9,575.00	\$10.00	6.09%	Stocks	
CVLG	Covenant Logistics Group, Inc.	\$27.18	2.33%	212.00	\$5,762.14	\$131.42	3.66%	Stocks	
BOOM	DMC Global Inc.	\$8.96	1.13%	40.00	\$358.40	\$4.00	0.23%	Stocks	
EBF	Ennis, Inc.	\$19.66	0.54%	140.00	\$2,751.70	\$14.70	1.75%	Stocks	
ESCA	Escalade, Incorporated	\$14.32	0.92%	534.00	\$7,646.88	\$69.42	4.86%	Stocks	
FONR	FONAR Corporation	\$18.68	(0.05%)	344.00	\$6,425.92	(\$3.44)	4.09%	Stocks	
FRD	Friedman Industries, Incorporated	\$19.40	(0.97%)	621.00	\$12,047.40	(\$117.99)	7.66%	Stocks	
GILT	Gilat Satellite Networks Ltd.	\$18.32	3.47%	144.00	\$2,638.73	\$88.49	1.68%	Stocks	
HOFT	Hooker Furnishings Corporation	\$13.22	0.53%	145.00	\$1,916.90	\$10.15	1.22%	Stocks	
KE	Kimball Electronics, Inc.	\$31.15	0.10%	186.00	\$5,793.90	\$5.58	3.68%	Stocks	
LAKE	Lakeland Industries, Inc.	\$9.36	2.52%	40.00	\$374.40	\$9.20	0.24%	Stocks	

Ask James (AI Chat)

Views with Plus Require A+/Platinum

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Stock Grades

Print Excel

↕ Ticker	↕ Company	↕ Value	↕ Growth	↕ Momentum	↕ Revision	↕ Quality	↕ Sector
+ AMPY	Amplify Energy Corp	A	C	C	F	D	Energy
+ APT	Alpha Pro Tech, Ltd.	A	D	D	NA	B	Industrials
+ AVD	American Vanguard Corporation	A	F	D	NA	C	Materials
+ BOOM	DMC Global Inc.	A	C	B	D	B	Energy
+ CMT	Core Molding Technologies, Inc.	B	C	C	NA	A	Materials
+ CTRM	Castor Maritime Inc.	A	D	D	NA	C	Industrials
+ CVLG	Covenant Logistics Group Inc	A	A	C	C	B	Industrials
+ EBF	Ennis, Inc.	B	D	C	D	A	Industrials
+ ESCA	Escalade Inc	A	A	C	NA	A	Consumer Discretionary
+ FONR	Fonar Corporation	B	B	B	NA	C	Health Care
+ FRD	Friedman Industries Inc	A	F	B	NA	D	Materials
+ GASS	StealthGas Inc	A	B	B	NA	A	Energy

Views with Plus Require A+/Platinum

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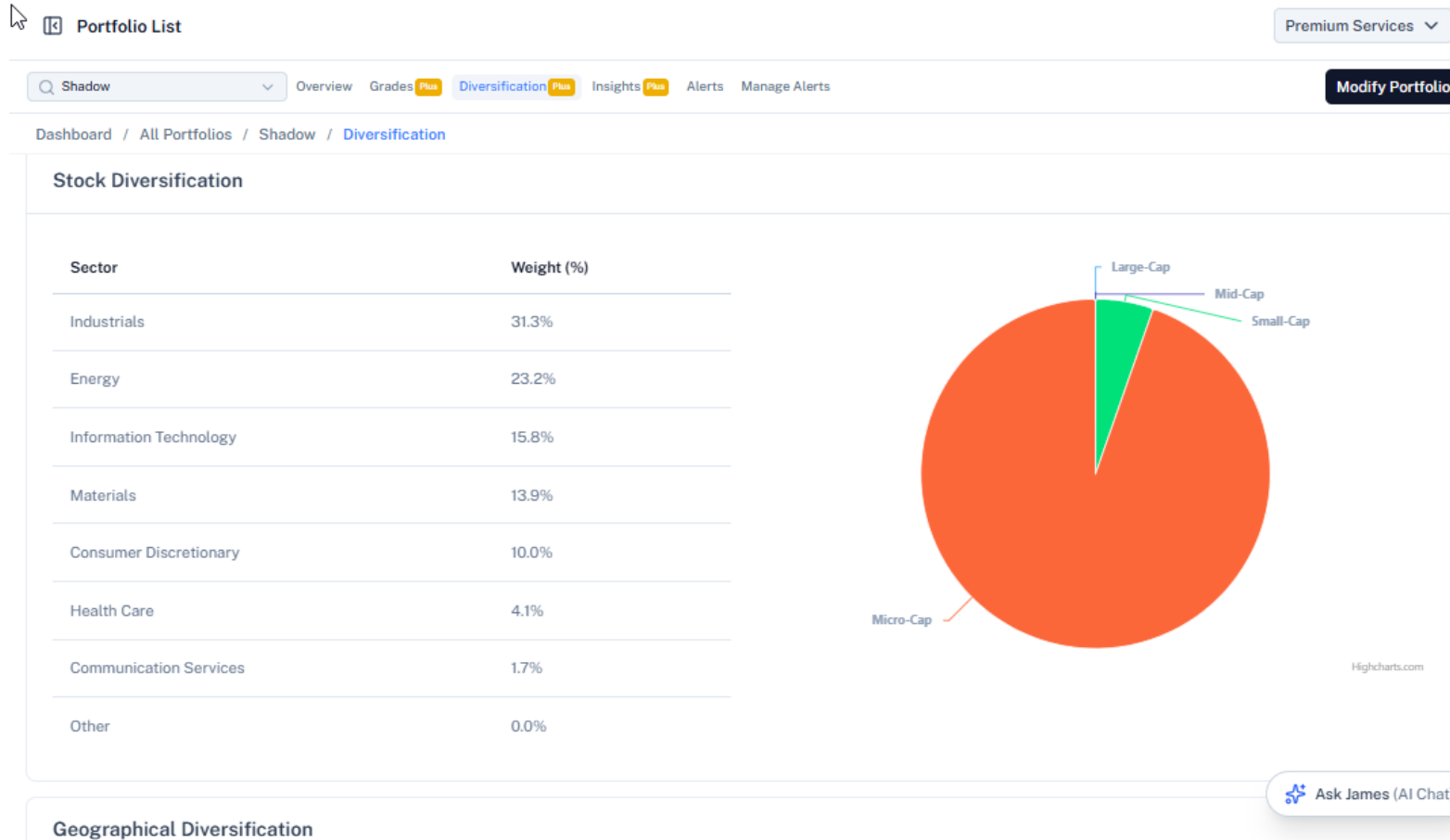
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Stock Grades

Print Excel

↕ Ticker	↕ Company	↕ Value	↕ Growth	↕ Momentum	↕ Revision	↕ Quality	↕ Sector
+ AMPY	Amplify Energy Corp	A	C	C	F	D	Energy
+ APT	Alpha Pro Tech, Ltd.	A	D	D	NA	B	Industrials
+ AVD	American Vanguard Corporation	A	F	D	NA	C	Materials
+ BOOM	DMC Global Inc.	A	C	B	D	B	Energy
+ CMT	Core Molding Technologies, Inc.	B	C	C	NA	A	Materials
+ CTRM	Castor Maritime Inc.	A	D	D	NA	C	Industrials
+ CVLG	Covenant Logistics Group Inc	A	A	C	C	B	Industrials
+ EBF	Ennis, Inc.	B	D	C	D	A	Industrials
+ ESCA	Escalade Inc	A	A	C	NA	A	Consumer Discretionary
+ FONR	Fonar Corporation	B	B	B	NA	C	Health Care
+ FRD	Friedman Industries Inc	A	F	B	NA	D	Materials
+ GASS	StealthGas Inc	A	B	B	NA	A	Energy

Diversification by Asset Groups, Sector, and Geographically



Alerts by Price & Grade Changes

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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. CVLD	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%

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 a '+ Add Holding' button and icons for 'Columns', 'Excel', 'Print', and 'Add Holding'.

	↑↓ 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	✓	\$5.13	\$6.33	\$3.28	\$140.60	-	0.65
Shadow	✓	\$4.61	\$6.55	\$2.27	\$193.10	-	0.49
AMPY	✓	\$2.10	\$2.92	\$1.84	\$19.90	-	0.04
CTRM	✓	\$19.15	\$22.29	\$12.25	\$163.80	20.7	1.05
CMT	✓	\$27.02	\$29.47	\$17.46	\$665.30	24.8	1.57
CVLG	✓	\$8.96	\$9.92	\$5.46	\$182.40	-	0.72
BOOM	✓	\$19.68	\$22.01	\$16.30	\$494.50	11.8	1.62
EBF	✓	\$14.37	\$16.99	\$11.41	\$195.90	15.4	1.14
ESCA	✓	\$18.69	\$18.86	\$12.00	\$122.40	17.2	0.70
FONR	✓	\$19.40	\$23.50	\$12.24	\$139.30	12.0	
FRD	✓	\$18.32	\$18.39	\$5.30	\$1,295.40	45.1	3.21
GILT	✓						

Users Can Modify These Special Views

Portfolio List

Premium Services

Search: Dreman Ideas Overview Grades Plus Diversification Plus Insights Plus Alerts Manage Alerts Modify Portfolio

Dashboard / All Portfolios / Dreman Ideas

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 ✓

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☐ **Tracking the Smart Money: Screening for Insider Activity**
SAVED ON JUN 10, 2025
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Strategy	V	G	M	S	EE	Y	Q	I	O	YTD (%)	3 Yr (%)	5 Yr (%)	10 Yr (%)	Risk Index
ADR Screen	V	G	M	S	EE	Y	Q	I	O	18.2%	5.9%	-3.6%	1.7%	1.4
Buffett: Hagstrom Screen	V	G	M	S	EE	Y	Q	I	O	5.9%	16.1%	10.7%	11.5%	1.2
Buffettology: EPS Growth	V	G	M	S	EE	Y	Q	I	O	17.7%	23.3%	12.0%	14.0%	1.3
Buffettology: Sustainable Growth Screen	V	G	M	S	EE	Y	Q	I	O	17.6%	23.1%	14.0%	17.7%	1.3
Cash Rich Firms Screen	V	G	M	S	EE	Y	Q	I	O	1.3%	4.9%	-2.6%	1.7%	1.4
Dividend (High Relative Yield) Screen	V	G	M	S	EE	Y	Q	I	O	6.0%	8.5%	10.9%	9.7%	1.1
Dogs of the Dow Screen	V	G	M	S	EE	Y	Q	I	O	20.6%	6.2%	4.8%	5.3%	1.2
Dogs of the Dow: Low Priced 5 Screen	V	G	M	S	EE	Y	Q	I	O	14.9%	-1.6%	-0.9%	0.4%	1.4
Dreman Screen	V	G	M	S	EE	Y	Q	I	O	28.0%	13.8%	6.5%	4.6%	1.3
Dreman With Est Revisions Screen	V	G	M	S	EE	Y	Q	I	O	24.6%	20.1%	15.2%	13.1%	1.5
Driehaus Revised Screen	V	G	M	S	EE	Y	Q	I	O	-12.3%	9.5%	11.6%	8.0%	2.3
Driehaus Screen	V	G	M	S	EE	Y	Q	I	O	21.6%	34.1%	7.0%	10.2%	
Dual Cash Flow Screen	V	G	M	S	EE	Y	Q	I	O	10.6%	15.1%	7.1%	8.3%	1.6

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Buffett: Hagstrom Screen

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+/- S&P 500

+6.2%

-14.4%

-2.4%

-1.5%

-0.2%

+2.3%

Performance

1711584000000

Buffettology: EPS Growth: \$1690

Buffettology: Sustainable Growth Screen: \$2478

Buffett: Hagstrom Screen: \$2799

S&P 500: \$439

Buffettology: EPS GrowthBuffettology: Sustainable Growth ScreenBuffett: Hagstrom ScreenS&P 500

Passing Companies

Company Name	Ticker	Exchange	Return on...	Ind. Retur...	Return on...	Net margi...	Ind. Net margi...	LT Debt/equi...	PE	Price/FCFPS	PFCF to FC...	Free Cash...
Arista Networks, Inc.	ANET	N	31.7	0.5	28.3	39.7	0.7	0	48.4	39.7	1.31	30.3
The Buckle, Inc.	BKE	N	41.3	10.2	56.2	16.1	1.5	57.2	13.6	14.6	0.77	18.9
Casey's General Stores, Inc.	CASY	M	17	11.2	17.3	3.6	1.8	73.9	38.5	38.4	0.41	92.7
Copart, Inc.	CPRT	M	18.2	4.8	24	34.2	2	0.9	25.3	28.3	0.96	29.4
Deckers Outdoor Corporation	DECK	N	43.3	11.9	34.4	19.4	4.5	11.1	15.1	15.6	0.47	33.5
DRDGOLD Limited	DRD	N	28.8	0.3	25.1	28.5	3.5	0.1	25	3.8	0.27	
EMCOR Group, Inc.	EME	N	37.1	11.7	21.8	7	3.6	10	28.5	29.2	0.73	
First BanCorp.	FBP	N	18.4	9.7	15.1	36.9	26.6	10.4	10.8	11.3	1.16	
Comfort Systems USA, Inc.	FIX	N	43.8	11.7	26.6	10.1	3.6	17.4	48.7	55.1	1.11	49.6

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SSR G3 Ideas

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Strategy Overview and Criteria

Every share of a company's common stock represents direct ownership of a business. Ownership of even a single share entitles the holder to a fractional ownership of the firm's net assets, which hopefully generate a reasonable flow of earnings and dividends. Shareholders do not normally run the company directly, but rather elect a board of directors that select the management team that actually operates the business.

Although most beginning investors understand the basic principles of company ownership, the everyday activity of the stock market tends to capture the majority of investor attention, and there is a tendency to think of the success and failure of a company through the movement of its stock price. While periods of optimism and pessimism for the market, industry or even the company may push the stock price of the company away from the value of the business, over the long term the stock price will tend to follow the economic worth of the company.

A fundamental approach to investing first begins with an understanding of the value of a business, and then determining if the current stock price presents an attractive buying opportunity.

Perhaps no other investor today is associated as strongly with the basic principles of fundamental investing as Warren Buffett. Buffett bears the distinction of having made this wealth through investing.

Buffett attracts attention, and a cottage industry has sprung up to pass on and interpret his fundamental teachings. While some critics feel that Buffett's strategy cannot be duplicated, Robert Hagstrom disagrees. He has authored a number of popular books that highlight Buffett's core investment principles. In "The Essential Buffett: Timeless Principles for the New Economy," Hagstrom argues that it is possible to duplicate Buffett's approach within your personal area of expertise. He presents the approach through an accessible series of questions that should be explored with any potential investment. The approach demands that you:

- Analyze a stock as a business,
- Demand a margin of safety for each purchase,
- Manage a focused portfolio, and
- Protect yourself from the speculative and emotional forces of the market.

Learning the Trade

Warren Buffett was born in Omaha, Nebraska, in 1930. His father was a stockbroker and U.S. congressman. While working at his father's brokerage firm, he came across Benjamin Graham's book "The Intelligent Investor," and applied to Columbia University to study under Graham. Buffett eventually joined Graham's investment management firm, where he learned firsthand how to apply Graham's investment approach.

In 1969, Buffett invested \$25 million in Berkshire Hathaway, an ailing textile company. While the textile division was closed down in 1985, the cash generated by the textile group was used to invest in other firms, most notably insurance companies. Insurance companies are effectively investment vehicles that invest the premiums paid by policyholders until claims are paid out. Today, Berkshire Hathaway is best thought of as a holding company that invests in a wide range of businesses beyond insurance.

Developing the Approach

Buffett feels that speculators are primarily concerned with a company's stock price, while investors first focus in on how the business is doing. Buffett is a firm believer that knowledge helps to increase investment return and reduce risk.

It is also important to keep one's emotions in check. We should not let our emotions override our good judgment. Every person must take their own psychology into account. Some losses are inevitable when it comes to investing, so if you cannot emotionally handle the volatility then you should consider a more conservative investing style.

Buy Great Companies, Not Great Stocks

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Performance

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	-1.6%	3.1%	4.5%	5.4%
Lakonishok Screen	V	G	M	S	EE	Y	Q	I	O	25.7%	18.4%	10.7%	13.3%
Neff Screen	V	G	M	S	EE	Y	Q	I	O	13.0%	16.4%	11.0%	8.4%
Piotroski: High F-Score Screen	V	G	M	S	EE	Y	Q	I	O	-1.1%	3.3%	-0.7%	-4.3%
Price-to-Free-Cash-Flow Screen	V	G	M	S	EE	Y	Q	I	O	15.6%	9.9%	14.1%	9.3%
Templeton Screen	V	G	M	S	EE	Y	Q	I	O	11.2%	26.2%	13.2%	9.3%
Value on the Move--PEG With Est Growth Screen	V	G	M	S	EE	Y	Q	I	O	57.1%	38.6%	21.9%	9.8%
Value on the Move--PEG With Hist Growth Screen	V	G	M	S	EE	Y	Q	I	O	15.0%	22.9%	14.2%	10.9%
Stock Market Winners Screen	V	G	M	S	EE	Y	Q	I	O	-1.8%	10.9%	-1.0%	4.4%
Buffett: Hagstrom Screen	V	G	M	S	EE	Y	Q	I	O	5.9%	16.1%	10.7%	11.5%
O'Neil's CAN SLIM Revised 3rd Edition Screen	V	G	M	S	EE	Y	Q	I	O	30.3%	4.9%	-3.6%	7.7%
Cash Rich Firms Screen	V	G	M	S	EE	Y	Q	I	O	1.3%	4.9%	-2.6%	1.7%
Dreman With Est Revisions Screen	V	G	M	S	EE	Y	Q	I	O	24.6%	20.1%	15.2%	13.1%
Zweig Screen	V	G	M	S	EE	Y	Q	I	O	30.2%	0.7%	4.1%	
S&P 500	V	G	M	S	EE	Y	Q	I	O	20.3%	23.9%	13.1%	

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▼ 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%

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Ticker	Company	# Screens	Screens	Portfolio(s)
+ ABT	Abbott Laboratories	2	Dividend (High Relative Yield) Screen Dividend (High Relative Yield) Screen	Dividend Aristocrats, Dremam Ideas
+ ADBE	Adobe Inc	1	P/E Relative Screen	Mixed Assets
+ ADM	Archer-Daniels-Midland Co	1	Est Rev: Lowest 30 Down	Dividend Aristocrats
+ AFL	Aflac Inc	1	P/E Relative Screen	Dividend Aristocrats
+ AMGN	Amgen, Inc.	1	Dogs of the Dow Screen	DJ 30
+ ANET	Arista Networks Inc	4	Buffett: Hagstrom Screen Buffettology: EPS Growth Buffettology: Sustainable Growth Screen P/E Relative Screen	SSR G1 Ideas
+ AOS	A O Smith Corp	1	Dividend (High Relative Yield) Screen	Dividend Aristocrats
+ AXP	American Express Company	2	O'Shaughnessy: Growth Market Leaders Screen O'Shaughnessy: Value Screen	DJ 30
+ BAP	Credicorp Ltd.	2	Dremam Screen Value on the Move--PEG With Est Growth Screen	Dremam Ideas

Try asking:
"What is the Value Grade of AMZN?"

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Minimum Amount of Screens Passed:

- 5 +

6 stocks pass at least 5 screens.

Data as of Jan 22, 2026

Ticker	Company	# Screens	Screens
+ AIR	AAR Corp.	5	☆ Est Rev: Top 30 Up ☆ Est Rev: Up 5% Screen ☆ Kirkpatrick Bargain Screen ☆ Kirkpatrick Growth Screen ★ Lakonishok Screen

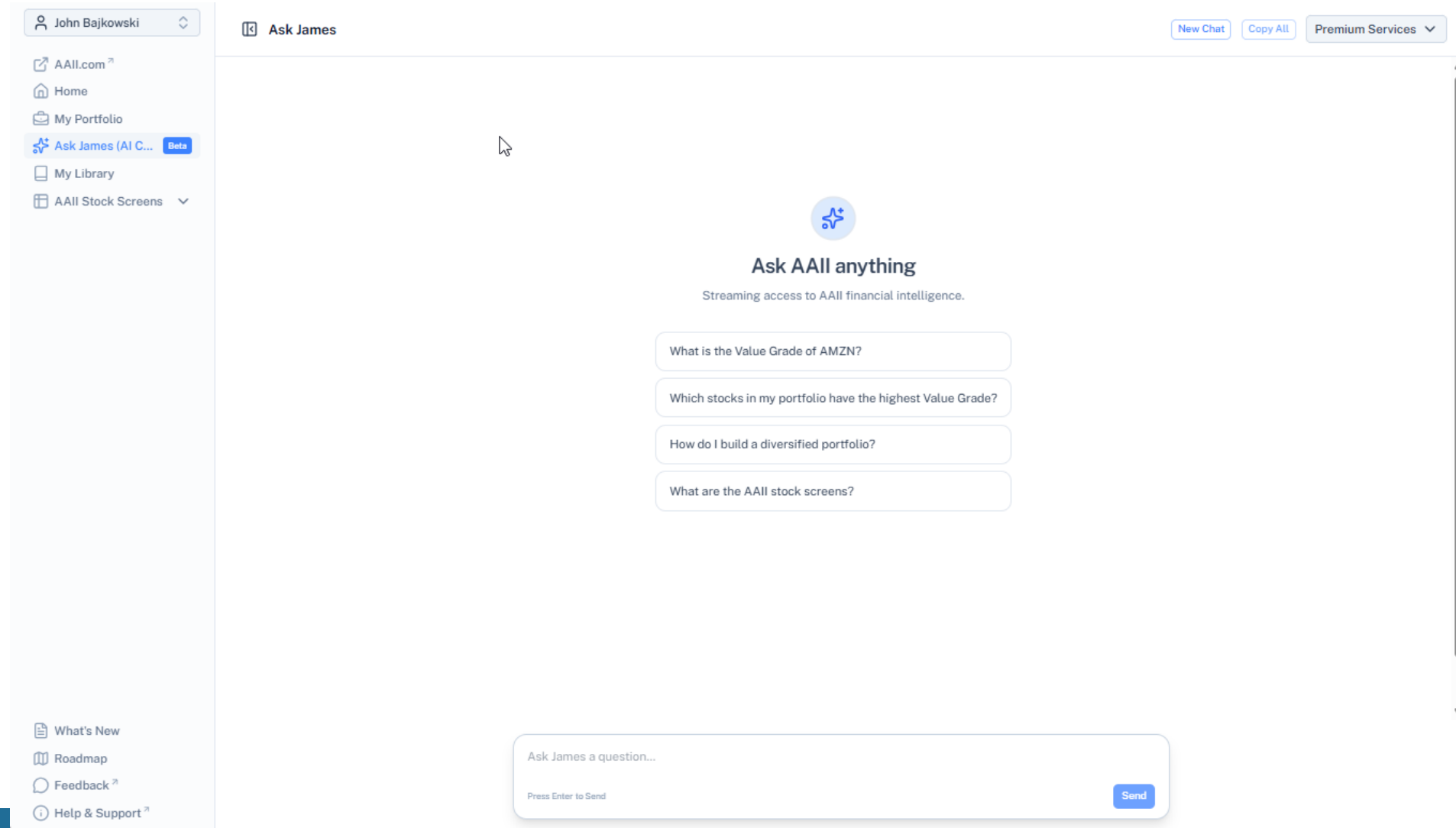
| + CALM | Cal-Maine Foods, Inc. | 5 | ☆ Buffettology: EPS Growth ☆ Fundamental Rule of Thumb Screen ★ Graham--Defensive Investor (Non-Utility) Screen ☆ Magic Formula Screen ☆ Rule #1 Investing Screen |

| + CPRX | Catalyst Pharmaceuticals, Inc. | 5 | ☆ Magic Formula Screen ☆ Muhlenkamp Screen ☆ Price-to-Sales Screen ☆ Return on Equity Screen |

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Expanding Internal AI Powered Chat

- Trained on AAI articles
- Access to data powering our stock and fund evaluators
- Continues to evolve as based upon member questions and answers



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

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Cynthia McLaughlin
Investment Editor
cmclaughlin@aaii.com



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