Stable Growth Stock Report

Top 20 Stocks Ranked by Stability & Consistent Growth
Report Date: July 08, 2026
Analysis Periods: 3Y, 2Y, 1Y, 6M

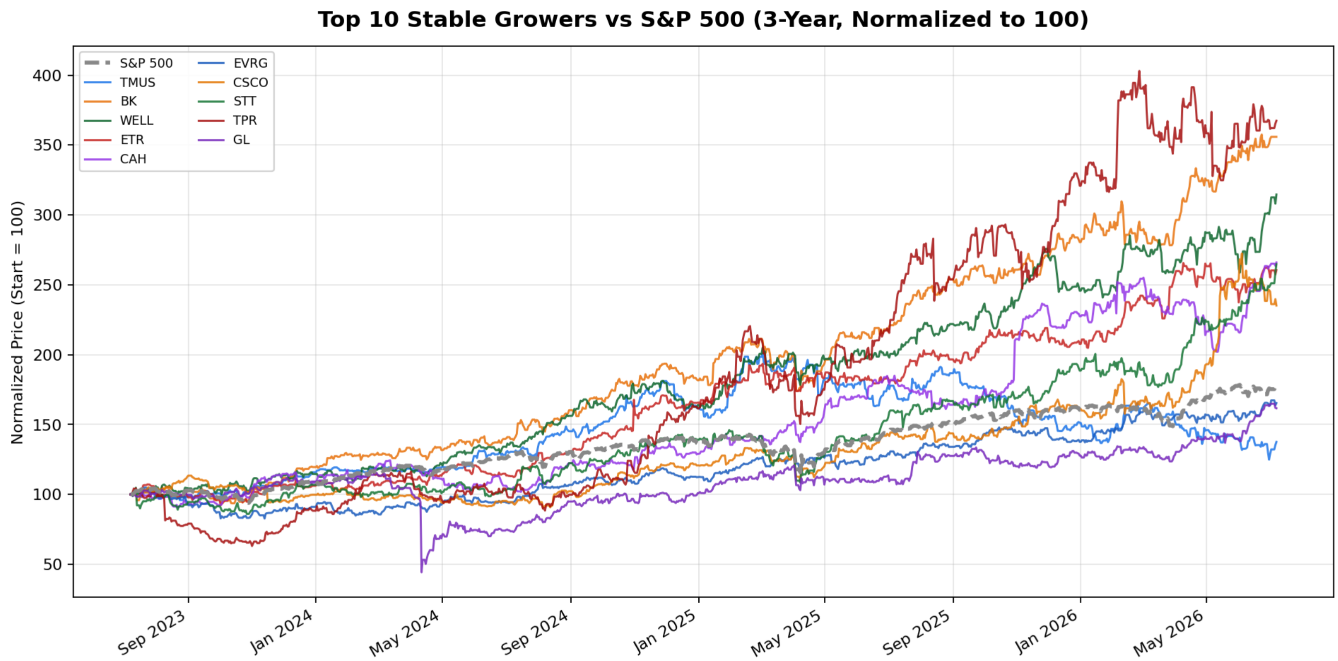
Methodology

This report identifies stocks with the smoothest, most consistent upward price trajectories. The **Stability Score** is a weighted composite: **R-squared** (35%) — linearity of log-price growth, **Annualized Return** (20%), **Low Volatility** (15%), **Small Max Drawdown** (15%), **Sharpe Ratio** (10%), **Cross-Period Consistency** (5%). Only stocks with positive growth over the longest available period qualify. All returns are compared against the S&P 500.

Key Metrics

R-squared (R^2) — How closely price follows a smooth exponential curve (1.0 = perfectly linear log-growth).
Annualized Volatility — Std dev of daily returns, annualized. Lower = smoother ride.
Max Drawdown — Largest peak-to-trough decline. Closer to 0% = less painful.
Sharpe Ratio — Risk-adjusted return (excess return / volatility). Higher = better.
Sortino Ratio — Like Sharpe but penalizes only downside moves. Higher = better.
Ulcer Index — Depth + duration of drawdowns combined. Lower = less pain.
Calmar Ratio — Annualized return / max drawdown. Higher = better risk/reward.
Beta — Sensitivity to S&P 500. Below 1 = less volatile than market.
Alpha — Return beyond what beta-adjusted market exposure would explain.

Performance Overview



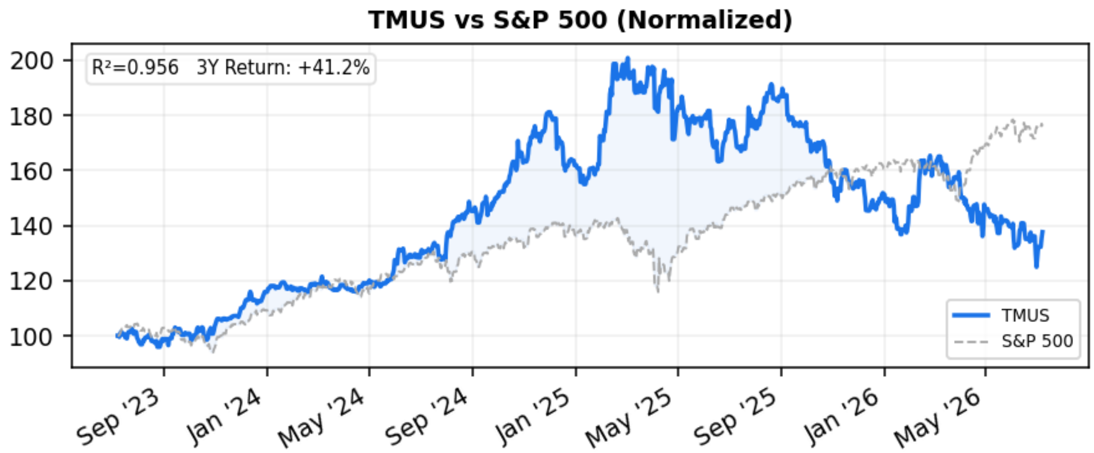
Rankings — Top 20 Stable Growth Stocks

#	Ticker	Company	Sector	Score	Return	S&P	Excess	R^2	Vol	MaxDD	Sharpe
1	TMUS	T-Mobile US, Inc.	Communication	0.927	+41.2%	+13.0%	+28.3%	0.956	15.6%	-5.1%	2.90
2	BK	The Bank of New York	Financial Ser	0.793	+160.4%	+41.1%	+119.3%	0.966	18.4%	-17.6%	1.58
3	WELL	Welltower Inc.	Real Estate	0.783	+137.5%	+41.1%	+96.4%	0.959	18.1%	-13.0%	1.44
4	ETR	Entergy Corporation	Utilities	0.758	+126.1%	+41.1%	+85.0%	0.920	19.6%	-10.6%	1.26
5	CAH	Cardinal Health, Inc	Healthcare	0.746	+148.6%	+41.1%	+107.5%	0.935	21.7%	-20.8%	1.30
6	EVRG	Evergy, Inc.	Utilities	0.745	+74.2%	+41.1%	+33.1%	0.955	13.4%	-8.0%	1.11
7	CSCO	Cisco Systems, Inc.	Technology	0.743	+156.8%	+41.1%	+115.7%	0.888	22.8%	-17.5%	1.30
8	STT	State Street Corpora	Financial Ser	0.730	+163.6%	+41.1%	+122.5%	0.894	21.8%	-25.7%	1.39
9	TPR	Tapestry, Inc.	Consumer Cycl	0.727	+252.0%	+41.1%	+210.9%	0.937	34.0%	-31.8%	1.27
10	GL	Globe Life Inc.	Financial Ser	0.726	+121.2%	+41.1%	+80.1%	0.877	19.6%	-14.7%	1.22
11	HYG	iShares iBoxx $ High	N/A	0.719	+5.7%	+12.3%	-6.6%	0.896	3.0%	-1.2%	1.06
12	VTR	Ventas, Inc.	Real Estate	0.715	+100.0%	+41.1%	+58.9%	0.879	17.5%	-13.7%	1.15
13	NI	NiSource Inc	Utilities	0.709	+77.4%	+41.1%	+36.3%	0.917	15.3%	-10.0%	1.03
14	GLW	Corning Incorporated	Technology	0.708	+403.2%	+41.1%	+362.1%	0.860	42.4%	-27.6%	1.38
15	BR	Broadridge Financial	Technology	0.707	+16.3%	+11.0%	+5.3%	0.831	14.8%	-5.5%	1.07
16	NTRS	Northern Trust Corpo	Financial Ser	0.699	+126.4%	+41.1%	+85.4%	0.908	22.5%	-25.2%	1.13
17	AEE	Ameren Corporation	Utilities	0.698	+70.5%	+41.1%	+29.4%	0.856	14.6%	-8.7%	0.98
18	LNT	Alliant Energy Corpo	Utilities	0.697	+64.9%	+41.1%	+23.8%	0.895	14.6%	-11.0%	0.91
19	L	Loews Corporation	Financial Ser	0.696	+57.3%	+41.1%	+16.2%	0.945	15.6%	-12.2%	0.76

#	Ticker	Company	Sector	Score	Return	S&P	Excess	R^2	Vol	MaxDD	Sharpe
20	GE	GE Aerospace	Industrials	0.694	+130.3%	+41.1%	+89.2%	0.898	27.2%	-21.4%	1.00

#1 TMUS — T-Mobile US, Inc.

Communication Services • Telecom Services



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+41.2%	+13.0%	+28.3%	15.6%	-5.1%	2.90	5.62

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.9271	**R-squared**	0.9559
Beta	0.4059	**Alpha (ann.)**	51.92%
Ulcer Index	0.0185	**Calmar Ratio**	12.1926
CV Monthly Ret	0.7958	**Ann. Return**	62.15%

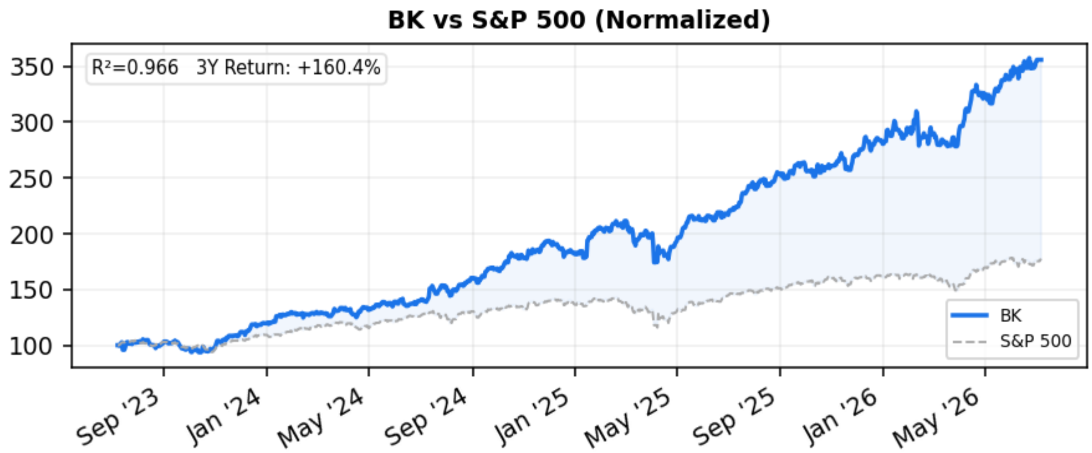
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$199.9B	**P/E Ratio**	19.30
Forward P/E	13.11	**PEG Ratio**	0.72
Div. Yield	224.0%	**Profit Margin**	11.6%
ROE	18.0%	**Revenue Growth**	10.6%
Debt/Equity	218.57	**Current Ratio**	1.09

52-Week Range: $167.73 — $221.98 | Current: $184.73 (-16.8% from 52w high)

#2 BK — The Bank of New York Mellon Cor

Financial Services • Banks - Diversified



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+160.4%	+41.1%	+119.3%	18.4%	-17.6%	1.58	2.42
2Y	+69.5%	+23.4%	+46.1%	19.1%	-17.6%	1.24	1.68
1Y	+37.6%	+9.1%	+28.5%	17.8%	-10.1%	1.63	2.49
6M	+23.8%	+9.1%	+14.7%	15.9%	-5.0%	2.50	4.73

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7926	**R-squared**	0.9665
Beta	0.8341	**Alpha (ann.)**	26.68%
Ulcer Index	0.0417	**Calmar Ratio**	2.1369
CV Monthly Ret	1.3119	**Ann. Return**	37.57%

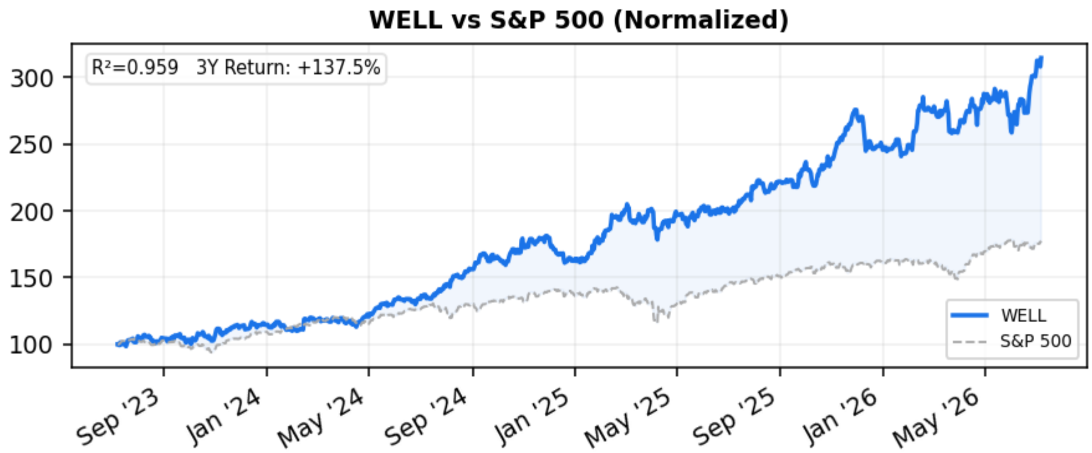
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$94.1B	**P/E Ratio**	17.02
Forward P/E	14.23	**PEG Ratio**	1.48
Div. Yield	1.5%	**Profit Margin**	28.7%
ROE	13.5%	**Revenue Growth**	13.4%
Debt/Equity	N/A	**Current Ratio**	N/A

52-Week Range: $105.96 — $147.29 | Current: $146.62 (-0.5% from 52w high)

#3 WELL — Welltower Inc.

Real Estate • REIT - Healthcare Facilities



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+137.5%	+41.1%	+96.4%	18.1%	-13.0%	1.44	2.22
2Y	+61.5%	+23.4%	+38.1%	18.9%	-13.0%	1.13	1.58
1Y	+34.8%	+9.1%	+25.7%	19.6%	-12.6%	1.40	2.05
6M	+14.9%	+9.1%	+5.7%	22.3%	-11.3%	1.16	1.63

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7829	**R-squared**	0.9587
Beta	0.2314	**Alpha (ann.)**	27.15%
Ulcer Index	0.0483	**Calmar Ratio**	2.5740
CV Monthly Ret	1.7790	**Ann. Return**	33.43%

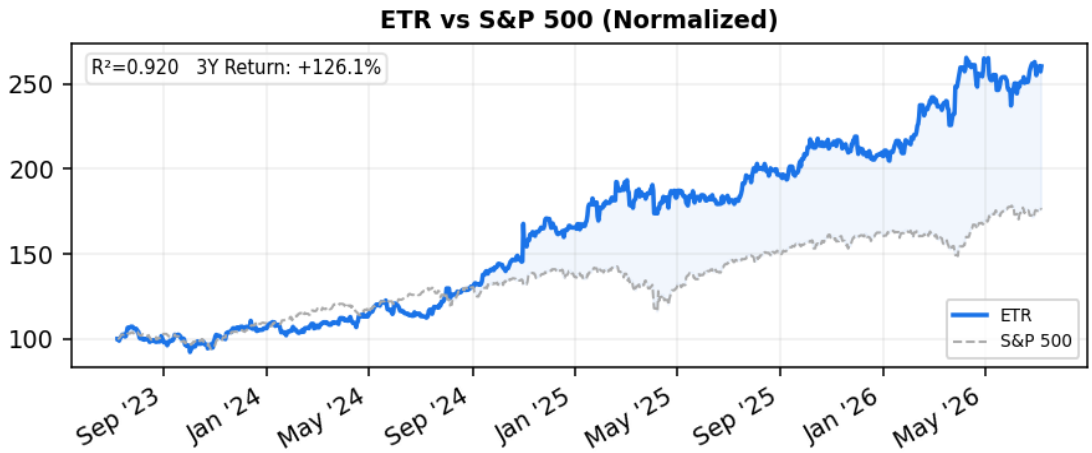
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$167.7B	**P/E Ratio**	112.60
Forward P/E	70.71	**PEG Ratio**	3.66
Div. Yield	127.0%	**Profit Margin**	12.0%
ROE	3.7%	**Revenue Growth**	38.3%
Debt/Equity	44.49	**Current Ratio**	1.65

52-Week Range: $176.27 — $237.59 | Current: $237.59 (+0.0% from 52w high)

#4 ETR — Entergy Corporation

Utilities • Utilities - Regulated Electric



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+126.1%	+41.1%	+85.0%	19.6%	-10.6%	1.26	1.98
2Y	+35.5%	+23.4%	+12.1%	17.7%	-10.6%	0.70	0.87
1Y	+22.3%	+9.1%	+13.2%	17.6%	-10.6%	0.98	1.39
6M	+8.2%	+9.1%	-1.0%	20.3%	-10.6%	0.66	0.85

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7582	**R-squared**	0.9202
Beta	0.2702	**Alpha (ann.)**	24.67%
Ulcer Index	0.0359	**Calmar Ratio**	2.9424
CV Monthly Ret	1.6332	**Ann. Return**	31.24%

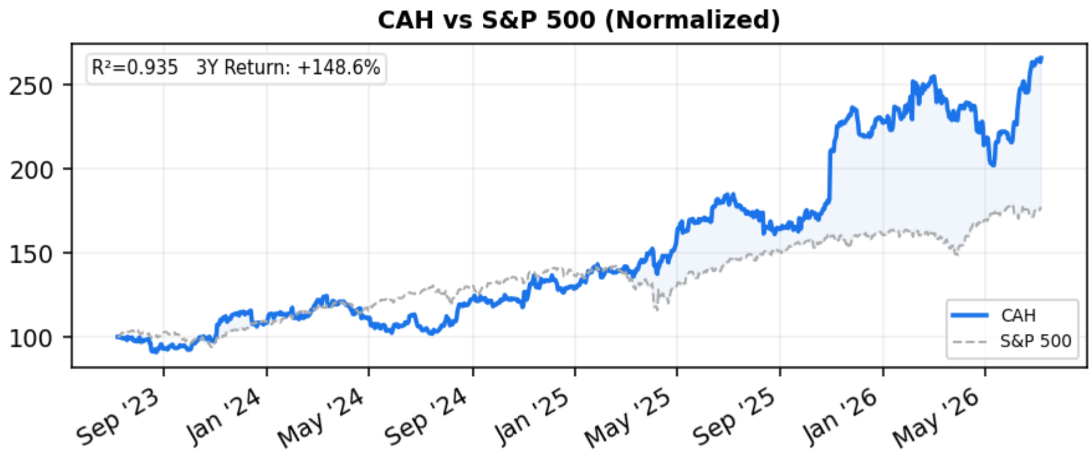
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$53.7B	**P/E Ratio**	29.09
Forward P/E	22.73	**PEG Ratio**	2.25
Div. Yield	225.0%	**Profit Margin**	13.4%
ROE	10.8%	**Revenue Growth**	12.0%
Debt/Equity	192.88	**Current Ratio**	0.96

52-Week Range: $90.59 — $117.44 | Current: $115.19 (-1.9% from 52w high)

#5 CAH — Cardinal Health, Inc.

Healthcare • Medical Distribution



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+148.6%	+41.1%	+107.5%	21.7%	-20.8%	1.30	2.13
2Y	+91.5%	+23.4%	+68.1%	23.6%	-20.8%	1.31	2.16
1Y	+46.1%	+9.1%	+37.0%	26.7%	-20.8%	1.39	2.75
6M	+7.4%	+9.1%	-1.7%	21.2%	-18.4%	0.57	0.69

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7457	**R-squared**	0.9348
Beta	0.2756	**Alpha (ann.)**	28.86%
Ulcer Index	0.0603	**Calmar Ratio**	1.7068
CV Monthly Ret	1.9858	**Ann. Return**	35.47%

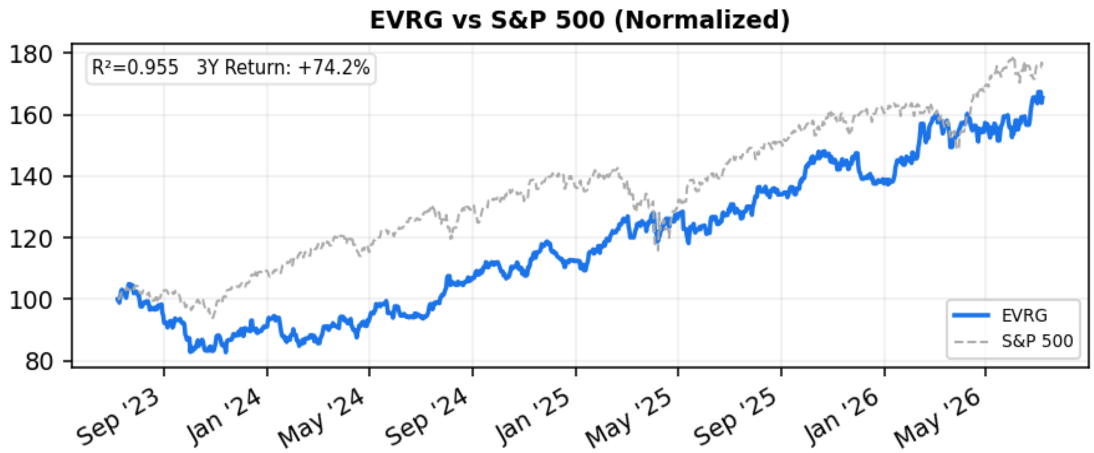
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$56.1B	**P/E Ratio**	36.21
Forward P/E	19.98	**PEG Ratio**	1.47
Div. Yield	86.0%	**Profit Margin**	0.6%
ROE	N/A	**Revenue Growth**	11.0%
Debt/Equity	N/A	**Current Ratio**	0.91

52-Week Range: $164.06 — $239.71 | Current: $239.71 (+0.0% from 52w high)

#6 EVRG — Evergy, Inc.

Utilities • Utilities - Regulated Electric



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+74.2%	+41.1%	+33.1%	13.4%	-8.0%	1.11	1.56
2Y	+34.7%	+23.4%	+11.2%	14.3%	-8.0%	0.80	1.05
1Y	+14.3%	+9.1%	+5.2%	14.1%	-6.9%	0.70	0.98
6M	+3.3%	+9.1%	-5.8%	15.3%	-6.7%	0.21	0.20

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7453	**R-squared**	0.9555
Beta	0.1090	**Alpha (ann.)**	14.99%
Ulcer Index	0.0296	**Calmar Ratio**	2.5362
CV Monthly Ret	1.8128	**Ann. Return**	20.32%

Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$20.1B	**P/E Ratio**	22.93
Forward P/E	19.13	**PEG Ratio**	2.41
Div. Yield	322.0%	**Profit Margin**	14.6%
ROE	8.9%	**Revenue Growth**	5.0%
Debt/Equity	155.56	**Current Ratio**	0.45

52-Week Range: $72.31 — $88.13 | Current: $87.12 (-1.1% from 52w high)

#7 CSCO — Cisco Systems, Inc.

Technology • Communication Equipment

Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+156.8%	+41.1%	+115.7%	22.8%	-17.5%	1.30	1.92
2Y	+76.6%	+23.4%	+53.2%	25.6%	-17.4%	1.07	1.51
1Y	+57.6%	+9.1%	+48.5%	29.9%	-13.7%	1.53	2.39
6M	+38.2%	+9.1%	+29.1%	33.1%	-13.7%	2.00	4.34

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7427	**R-squared**	0.8881
Beta	0.9008	**Alpha (ann.)**	25.55%
Ulcer Index	0.0507	**Calmar Ratio**	2.1162
CV Monthly Ret	1.9702	**Ann. Return**	36.94%

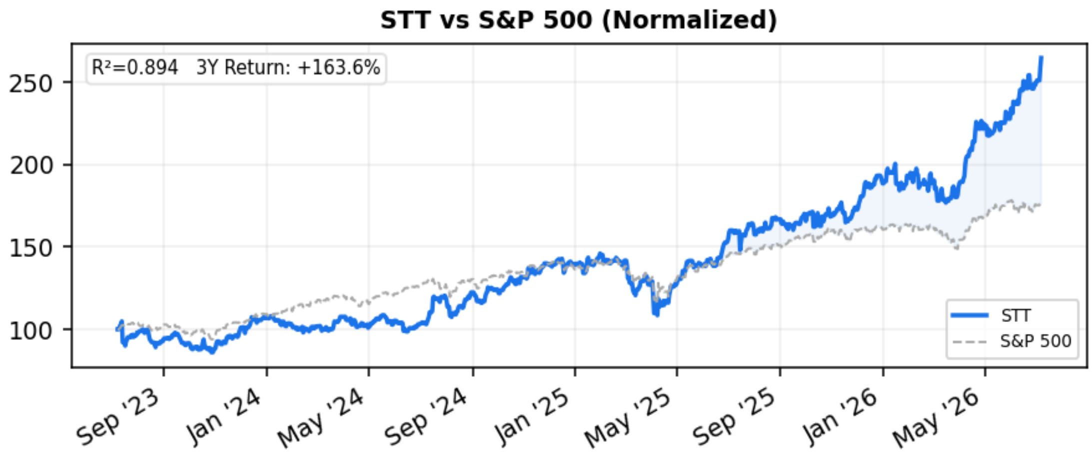
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$440.6B	**P/E Ratio**	38.02
Forward P/E	23.40	**PEG Ratio**	1.58
Div. Yield	147.0%	**Profit Margin**	19.7%
ROE	25.2%	**Revenue Growth**	12.0%
Debt/Equity	67.54	**Current Ratio**	0.93

52-Week Range: $70.66 — $129.52 | Current: $111.79 (-13.7% from 52w high)

#8 STT — State Street Corporation

Financial Services • Asset Management



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+163.6%	+41.1%	+122.5%	21.8%	-25.7%	1.39	1.95
2Y	+85.7%	+23.4%	+62.3%	23.2%	-23.9%	1.26	1.67
1Y	+55.1%	+9.1%	+46.0%	20.6%	-11.8%	2.02	3.28
6M	+42.2%	+9.1%	+33.1%	20.4%	-5.0%	3.37	8.05

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7303	**R-squared**	0.8943
Beta	1.0174	**Alpha (ann.)**	25.85%
Ulcer Index	0.0581	**Calmar Ratio**	1.4850
CV Monthly Ret	1.5504	**Ann. Return**	38.14%

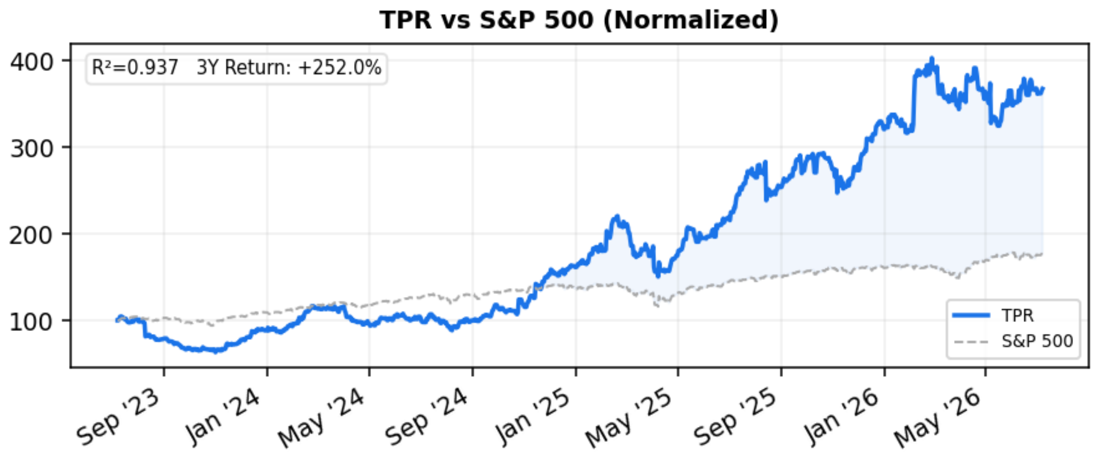
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$49.8B	**P/E Ratio**	17.85
Forward P/E	12.52	**PEG Ratio**	1.18
Div. Yield	191.0%	**Profit Margin**	21.3%
ROE	11.3%	**Revenue Growth**	-2.8%
Debt/Equity	N/A	**Current Ratio**	N/A

52-Week Range: $112.11 — $179.94 | Current: $179.94 (+0.0% from 52w high)

#9 TPR — Tapestry, Inc.

Consumer Cyclical • Luxury Goods



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+252.0%	+41.1%	+210.9%	34.0%	-31.8%	1.27	1.94
2Y	+66.6%	+23.4%	+43.2%	34.8%	-31.8%	0.78	0.87
1Y	+30.0%	+9.1%	+20.9%	32.9%	-19.4%	0.83	1.03
6M	-6.5%	+9.1%	-15.6%	33.3%	-17.4%	-0.37	-0.64

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7275	**R-squared**	0.9371
Beta	1.2273	**Alpha (ann.)**	38.22%
Ulcer Index	0.0945	**Calmar Ratio**	1.6401
CV Monthly Ret	1.9729	**Ann. Return**	52.12%

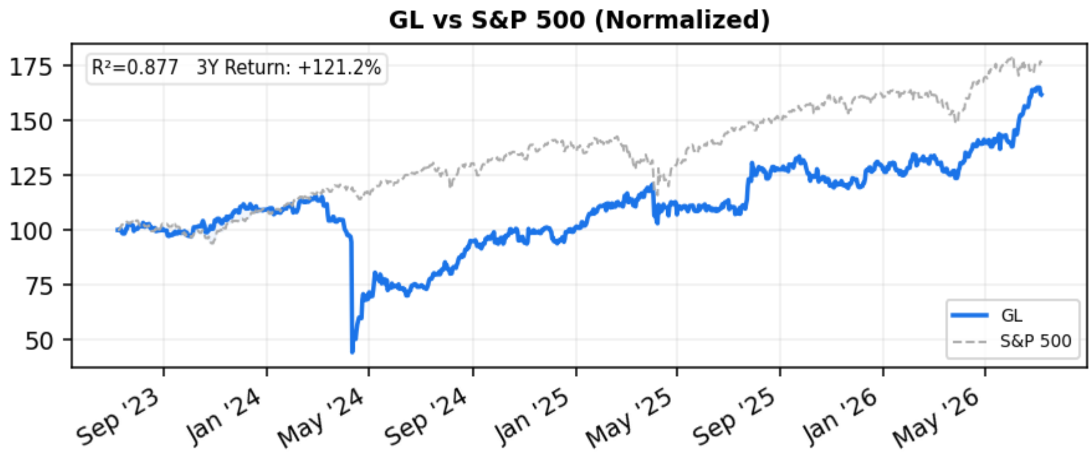
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$29.6B	**P/E Ratio**	44.47
Forward P/E	18.84	**PEG Ratio**	0.30
Div. Yield	110.0%	**Profit Margin**	8.4%
ROE	60.9%	**Revenue Growth**	21.2%
Debt/Equity	574.91	**Current Ratio**	1.84

52-Week Range: $98.47 — $160.49 | Current: $146.30 (-8.8% from 52w high)

#10 GL — Globe Life Inc.

Financial Services • Insurance - Life



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+121.2%	+41.1%	+80.1%	19.6%	-14.7%	1.22	1.78
2Y	+43.6%	+23.4%	+20.2%	20.0%	-14.7%	0.78	1.03
1Y	+34.4%	+9.1%	+25.3%	15.4%	-8.1%	1.71	2.77
6M	+22.1%	+9.1%	+12.9%	16.5%	-6.7%	2.24	3.73

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7258	**R-squared**	0.8766
Beta	0.6311	**Alpha (ann.)**	20.97%
Ulcer Index	0.0499	**Calmar Ratio**	2.0606
CV Monthly Ret	1.8808	**Ann. Return**	30.30%

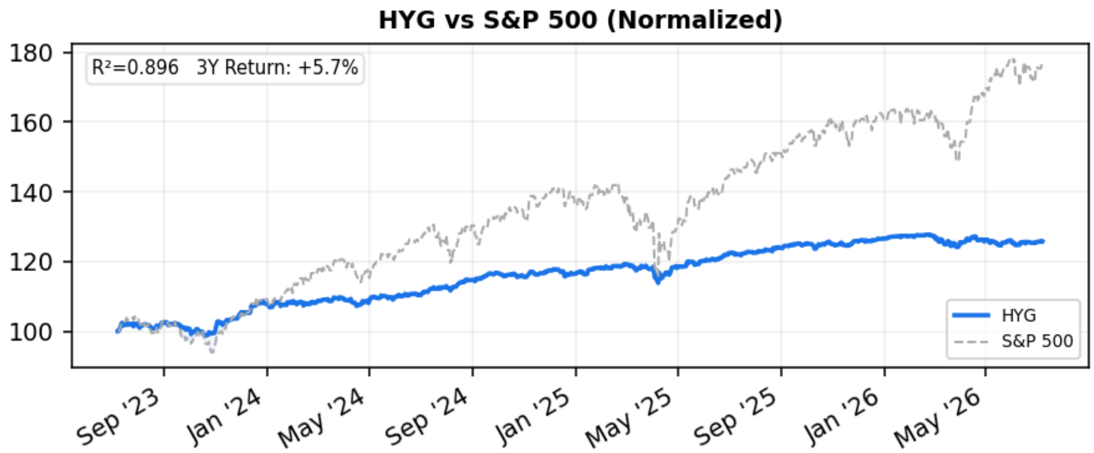
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$13.7B	**P/E Ratio**	12.25
Forward P/E	10.61	**PEG Ratio**	1.30
Div. Yield	75.0%	**Profit Margin**	19.4%
ROE	20.5%	**Revenue Growth**	5.4%
Debt/Equity	53.59	**Current Ratio**	0.66

52-Week Range: $130.12 — $180.16 | Current: $176.67 (-1.9% from 52w high)

#11 HYG — iShares iBoxx $ High Yield Corp

N/A • N/A



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+5.7%	+12.3%	-6.6%	3.0%	-1.2%	1.06	1.73

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7192	**R-squared**	0.8957
Beta	0.1708	**Alpha (ann.)**	1.20%
Ulcer Index	0.0038	**Calmar Ratio**	6.7232
CV Monthly Ret	1.3304	**Ann. Return**	7.84%

Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	N/A	**P/E Ratio**	10.97
Forward P/E	1329.33	**PEG Ratio**	N/A
Div. Yield	590.0%	**Profit Margin**	N/A
ROE	N/A	**Revenue Growth**	N/A
Debt/Equity	N/A	**Current Ratio**	N/A

52-Week Range: $78.72 — $81.00 | Current: $79.76 (-1.5% from 52w high)

#12 VTR — Ventas, Inc.

Real Estate • REIT - Healthcare Facilities

Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+100.0%	+41.1%	+58.9%	17.5%	-13.7%	1.15	1.72
2Y	+44.4%	+23.4%	+21.0%	17.4%	-12.5%	0.89	1.20
1Y	+35.6%	+9.1%	+26.5%	18.0%	-12.5%	1.54	2.62
6M	+8.4%	+9.1%	-0.7%	20.3%	-12.5%	0.68	0.89

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7151	**R-squared**	0.8790
Beta	0.1604	**Alpha (ann.)**	20.26%
Ulcer Index	0.0514	**Calmar Ratio**	1.8902
CV Monthly Ret	2.1400	**Ann. Return**	25.98%

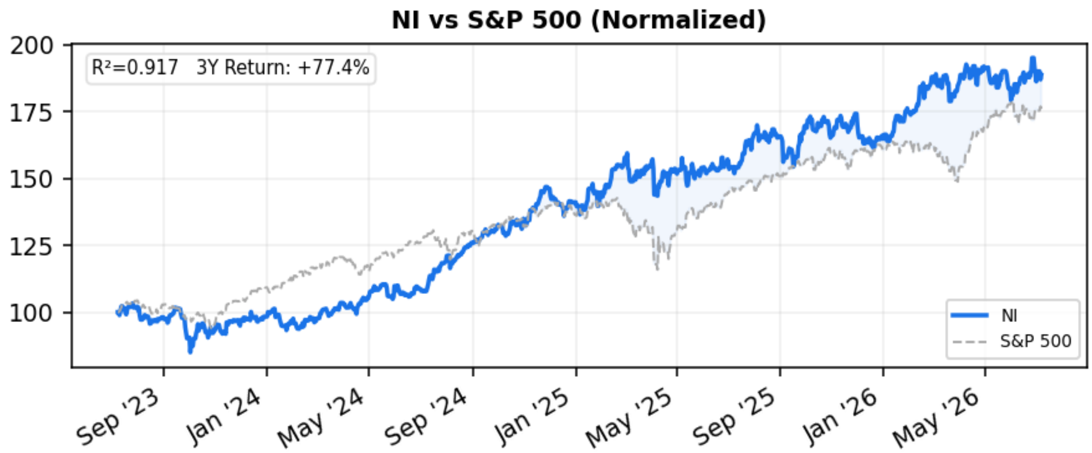
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$45.7B	**P/E Ratio**	167.98
Forward P/E	111.11	**PEG Ratio**	1.72
Div. Yield	217.0%	**Profit Margin**	4.3%
ROE	2.1%	**Revenue Growth**	21.9%
Debt/Equity	93.74	**Current Ratio**	0.21

52-Week Range: $69.36 — $94.07 | Current: $94.07 (+0.0% from 52w high)

#13 NI — NiSource Inc

Utilities • Utilities - Regulated Gas



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+77.4%	+41.1%	+36.3%	15.3%	-10.0%	1.03	1.35
2Y	+21.7%	+23.4%	-1.7%	16.2%	-10.0%	0.41	0.44
1Y	+13.4%	+9.1%	+4.3%	14.6%	-7.2%	0.63	0.81
6M	-0.1%	+9.1%	-9.3%	16.0%	-7.0%	-0.22	-0.40

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7087	**R-squared**	0.9172
Beta	0.2954	**Alpha (ann.)**	14.28%
Ulcer Index	0.0325	**Calmar Ratio**	2.1063
CV Monthly Ret	1.8658	**Ann. Return**	21.05%

Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$22.8B	**P/E Ratio**	23.39
Forward P/E	21.11	**PEG Ratio**	2.68
Div. Yield	255.0%	**Profit Margin**	14.1%
ROE	9.1%	**Revenue Growth**	8.2%
Debt/Equity	140.91	**Current Ratio**	0.65

52-Week Range: $40.69 — $49.08 | Current: $47.49 (-3.2% from 52w high)

#14 GLW — Corning Incorporated

Technology • Electronic Components

Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+403.2%	+41.1%	+362.1%	42.4%	-27.6%	1.38	2.23
2Y	+258.7%	+23.4%	+235.2%	48.5%	-27.5%	1.47	2.50
1Y	+106.0%	+9.1%	+96.9%	62.1%	-27.5%	1.40	2.42
6M	+28.0%	+9.1%	+18.9%	75.3%	-27.5%	0.97	1.17

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7084	**R-squared**	0.8605
Beta	1.5385	**Alpha (ann.)**	55.08%
Ulcer Index	0.0893	**Calmar Ratio**	2.5886
CV Monthly Ret	2.0077	**Ann. Return**	71.36%

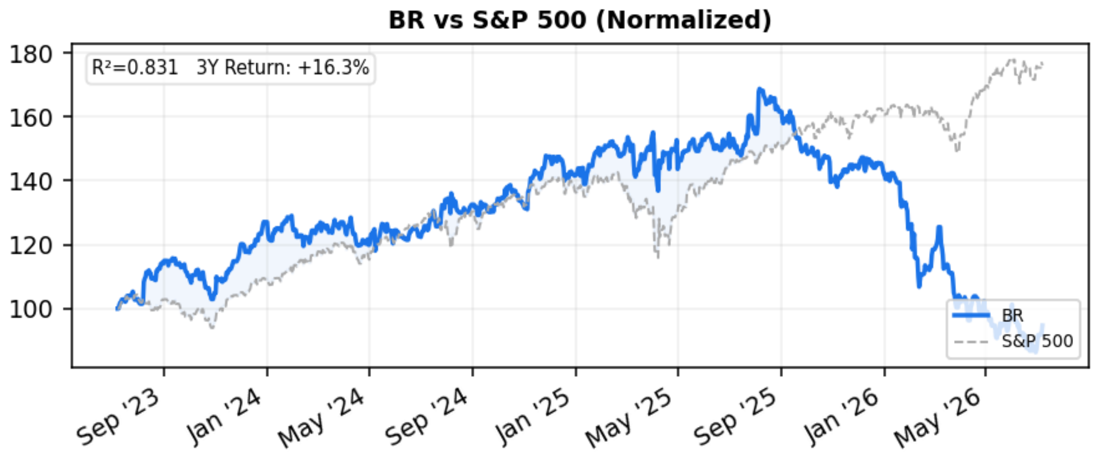
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$159.5B	**P/E Ratio**	93.63
Forward P/E	43.41	**PEG Ratio**	1.52
Div. Yield	57.0%	**Profit Margin**	11.1%
ROE	16.7%	**Revenue Growth**	20.0%
Debt/Equity	80.36	**Current Ratio**	1.61

52-Week Range: $78.03 — $255.69 | Current: $185.38 (-27.5% from 52w high)

#15 BR — Broadridge Financial Solutions,

Technology • Information Technology Services



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+16.3%	+11.0%	+5.3%	14.8%	-5.5%	1.07	1.73

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.7074	**R-squared**	0.8308
Beta	0.5863	**Alpha (ann.)**	10.97%
Ulcer Index	0.0252	**Calmar Ratio**	3.8633
CV Monthly Ret	2.3728	**Ann. Return**	21.10%

Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$17.2B	**P/E Ratio**	15.48
Forward P/E	14.27	**PEG Ratio**	0.99
Div. Yield	269.0%	**Profit Margin**	15.0%
ROE	42.3%	**Revenue Growth**	7.8%
Debt/Equity	120.88	**Current Ratio**	0.94

52-Week Range: $135.44 — $231.04 | Current: $148.60 (-35.7% from 52w high)

#16 NTRS — Northern Trust Corporation

Financial Services • Asset Management

Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+126.4%	+41.1%	+85.4%	22.5%	-25.2%	1.13	1.70
2Y	+63.8%	+23.4%	+40.4%	24.1%	-25.2%	0.96	1.39
1Y	+43.4%	+9.1%	+34.3%	21.1%	-12.9%	1.61	2.82
6M	+25.7%	+9.1%	+16.6%	21.4%	-6.8%	2.06	4.34

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.6986	**R-squared**	0.9076
Beta	1.0130	**Alpha (ann.)**	19.06%
Ulcer Index	0.0643	**Calmar Ratio**	1.2421
CV Monthly Ret	2.1336	**Ann. Return**	31.32%

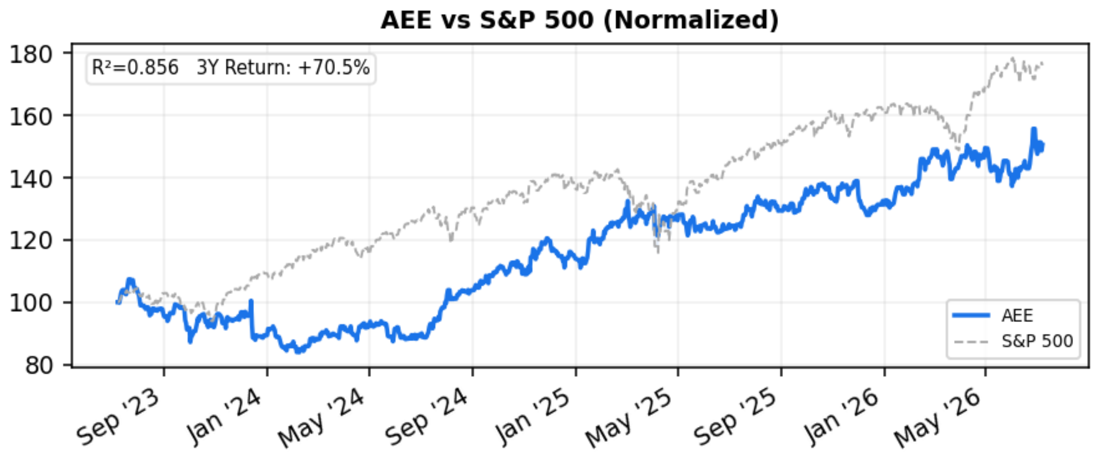
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$33.6B	**P/E Ratio**	18.95
Forward P/E	14.83	**PEG Ratio**	1.42
Div. Yield	177.0%	**Profit Margin**	22.4%
ROE	14.5%	**Revenue Growth**	13.9%
Debt/Equity	N/A	**Current Ratio**	N/A

52-Week Range: $121.98 — $181.39 | Current: $181.39 (+0.0% from 52w high)

#17 AEE — Ameren Corporation

Utilities • Utilities - Regulated Electric



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+70.5%	+41.1%	+29.4%	14.6%	-8.7%	0.98	1.39
2Y	+20.3%	+23.4%	-3.1%	14.8%	-8.7%	0.40	0.45
1Y	+12.7%	+9.1%	+3.6%	15.1%	-8.7%	0.57	0.73
6M	+1.0%	+9.1%	-8.2%	17.3%	-8.7%	-0.06	-0.20

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.6975	**R-squared**	0.8562
Beta	0.1121	**Alpha (ann.)**	14.11%
Ulcer Index	0.0362	**Calmar Ratio**	2.2334
CV Monthly Ret	2.1969	**Ann. Return**	19.47%

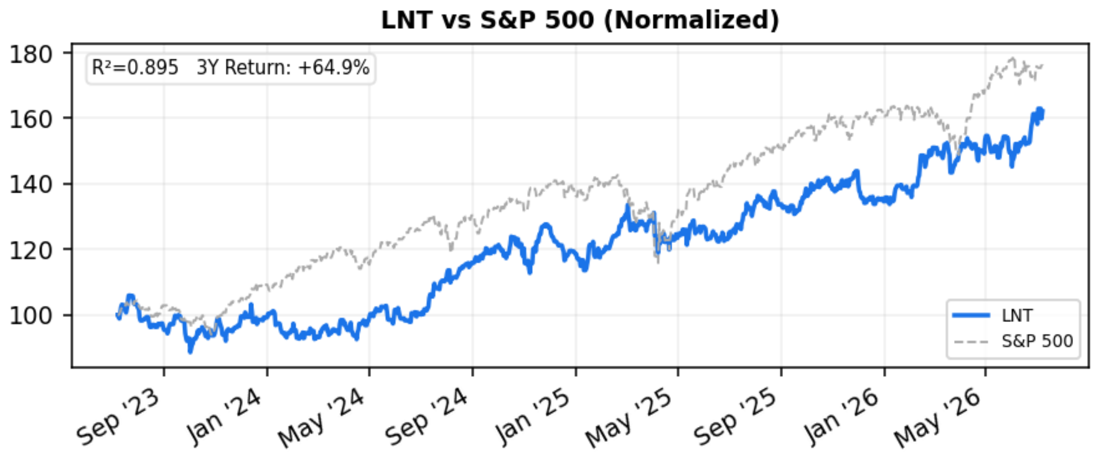
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$31.7B	**P/E Ratio**	20.33
Forward P/E	19.70	**PEG Ratio**	2.62
Div. Yield	266.0%	**Profit Margin**	17.8%
ROE	11.7%	**Revenue Growth**	3.7%
Debt/Equity	155.67	**Current Ratio**	0.62

52-Week Range: $97.25 — $118.32 | Current: $114.43 (-3.3% from 52w high)

#18 LNT — Alliant Energy Corporation

Utilities • Utilities - Regulated Electric



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+64.9%	+41.1%	+23.8%	14.6%	-11.0%	0.91	1.23
2Y	+30.0%	+23.4%	+6.6%	14.6%	-11.0%	0.67	0.84
1Y	+16.3%	+9.1%	+7.2%	13.9%	-7.0%	0.84	1.14
6M	+7.4%	+9.1%	-1.7%	15.6%	-6.1%	0.71	0.94

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.6965	**R-squared**	0.8946
Beta	0.1285	**Alpha (ann.)**	12.66%
Ulcer Index	0.0414	**Calmar Ratio**	1.6526
CV Monthly Ret	2.3076	**Ann. Return**	18.14%

Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$20.1B	**P/E Ratio**	24.11
Forward P/E	21.07	**PEG Ratio**	2.65
Div. Yield	272.0%	**Profit Margin**	18.6%
ROE	11.3%	**Revenue Growth**	5.0%
Debt/Equity	159.53	**Current Ratio**	0.69

52-Week Range: $64.08 — $78.03 | Current: $77.65 (-0.5% from 52w high)

#19 L — Loews Corporation

Financial Services • Insurance - Property & Casualty

Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+57.3%	+41.1%	+16.2%	15.6%	-12.2%	0.76	0.94
2Y	+40.9%	+23.4%	+17.4%	15.6%	-12.2%	0.89	1.11
1Y	+19.7%	+9.1%	+10.6%	14.0%	-8.0%	1.04	1.39
6M	+4.9%	+9.1%	-4.2%	16.0%	-8.0%	0.40	0.41

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.6961	**R-squared**	0.9455
Beta	0.4657	**Alpha (ann.)**	8.23%
Ulcer Index	0.0338	**Calmar Ratio**	1.3403
CV Monthly Ret	2.4261	**Ann. Return**	16.30%

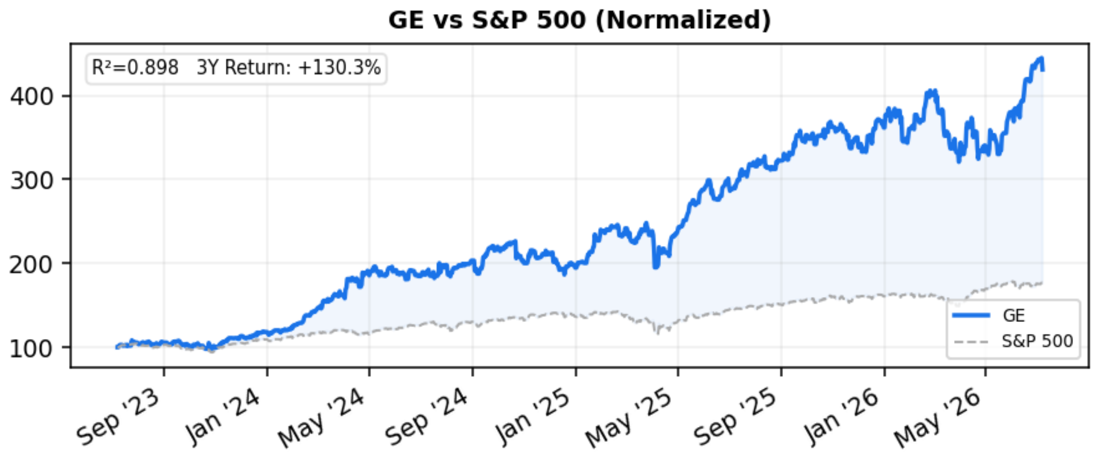
Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$24.1B	**P/E Ratio**	14.79
Forward P/E	40.33	**PEG Ratio**	1.32
Div. Yield	21.0%	**Profit Margin**	8.8%
ROE	9.2%	**Revenue Growth**	1.4%
Debt/Equity	45.60	**Current Ratio**	0.50

52-Week Range: $97.74 — $116.95 | Current: $116.95 (+0.0% from 52w high)

#20 GE — GE Aerospace

Industrials • Aerospace & Defense



Performance Across Periods vs S&P 500

Period	Stock Return	S&P 500	Excess	Ann. Vol	Max DD	Sharpe	Sortino
3Y	+130.3%	+41.1%	+89.2%	27.2%	-21.4%	1.00	1.30
2Y	+75.3%	+23.4%	+51.9%	27.9%	-21.4%	0.99	1.31
1Y	+16.9%	+9.1%	+7.8%	29.0%	-21.0%	0.53	0.58
6M	+8.0%	+9.1%	-1.1%	32.6%	-19.6%	0.50	0.52

Stability & Risk Metrics

Metric	Value	Metric	Value
Stability Score	0.6938	**R-squared**	0.8984
Beta	1.1696	**Alpha (ann.)**	18.59%
Ulcer Index	0.0731	**Calmar Ratio**	1.5003
CV Monthly Ret	2.3361	**Ann. Return**	32.05%

Fundamentals (Yahoo Finance)

Metric	Value	Metric	Value
Market Cap	$383.4B	**P/E Ratio**	46.93
Forward P/E	42.22	**PEG Ratio**	9.11
Div. Yield	50.0%	**Profit Margin**	17.9%
ROE	45.4%	**Revenue Growth**	24.7%
Debt/Equity	116.53	**Current Ratio**	1.01

52-Week Range: $273.25 — $378.68 | Current: $366.98 (-3.1% from 52w high)

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