

Chartbook Review

(charts as of 04/23/2025)

Most Requested Names:

***ETN, VRT, ANET, AVGO, BX, COIN, FCX,
LULU, MRVL, MSTR, PEP, STX, TRGP, TT***

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Chartbook: Stocks of Interest

Sym	Company	trkPrice	Sector ▲	Industry
TT	Trane Technologies	335.87	Basic Materials Sector	Building Materials
FCX	Freeport-McMoran Inc	35.19	Basic Materials Sector	Copper
FNV	Franco Nevada Corp	170.13	Basic Materials Sector	Gold
RIO	Rio Tinto Plc Adr	60.20	Basic Materials Sector	Industrial Metals & Minerals
PVH	Phillips-Van Heusen Corp	71.97	Consumer Cyclical Sector	Apparel Manufacturing
LULU	Lululemon Athletica Inc.	265.76	Consumer Cyclical Sector	Apparel Stores
CVNA	Carvana Co	220.85	Consumer Cyclical Sector	Auto & Truck Dealerships
KMX	Carmax Inc	65.77	Consumer Cyclical Sector	Auto & Truck Dealerships
STLA	Stellantis N.V.	8.92	Consumer Cyclical Sector	Auto Manufacturers
DECK	Deckers Outdoor Corp	106.66	Consumer Cyclical Sector	Footwear & Accessories
FND	Floor & Decor Holdings Inc	69.75	Consumer Cyclical Sector	Home Improvement Stores
HD	Home Depot Inc	356.42	Consumer Cyclical Sector	Home Improvement Stores
ROKU	Roku Inc	62.60	Consumer Cyclical Sector	Media - Diversified
CPNG	Coupan Inc	22.57	Consumer Cyclical Sector	Specialty Retail
MELI	MercadoLibre Inc	2139.92	Consumer Cyclical Sector	Specialty Retail
W	Wayfair	28.28	Consumer Cyclical Sector	Specialty Retail
PEP	Pepsico Inc	142.20	Consumer Defensive Sector	Beverages - Soft Drinks
BKR	Baker Hughes Company	35.88	Energy Sector	Oil & Gas Equipment & Services
TRGP	Targa Resources Corp	172.32	Energy Sector	Oil & Gas Midstream
VLO	Valero Energy Corp	114.43	Energy Sector	Oil & Gas Refining & Marketing
APO	Apollo Asset Management Inc.	126.52	Financial Services Sector	Asset Management
BX	Blackstone Inc	127.00	Financial Services Sector	Asset Management
OWL	Blue Owl Capital Inc	17.67	Financial Services Sector	Asset Management
STT	State Street Corp	85.52	Financial Services Sector	Asset Management
MRX	Marex Group plc	39.19	Financial Services Sector	Capital Markets
MS	Morgan Stanley	112.31	Financial Services Sector	Capital Markets
MA	Mastercard Incorporated	530.01	Financial Services Sector	Credit Services
COIN	Coinbase Global Inc	194.80	Financial Services Sector	Financial Data & Stock Exchanges
UNM	Unum Group	78.70	Financial Services Sector	Insurance - Life
ALL	Allstate Corporation	194.73	Financial Services Sector	Insurance - Property & Casualty
SKWD	Skyward Specialty Insurance Grou	54.86	Financial Services Sector	Insurance - Property & Casualty

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ADMA	ADMA Biologics Inc	21.72	Healthcare Sector	Biotechnology
HALO	Halozyme Therapeutics Inc	58.44	Healthcare Sector	Biotechnology
NVO	Novo Nordisk A/S	61.29	Healthcare Sector	Biotechnology
IQV	IQVIA Holdings Inc	147.06	Healthcare Sector	Diagnostics & Research
JNJ	Johnson & Johnson	155.24	Healthcare Sector	Drug Manufacturers - Major
UNH	UnitedHealth Group Inc.	427.96	Healthcare Sector	Health Care Plans
DXCM	DexCom Inc	66.90	Healthcare Sector	Medical Devices
ISRG	Intuitive Surgical Inc	487.93	Healthcare Sector	Medical Instruments & Supplies
LHX	L3Harris Technologies, Inc	216.31	Industrials Sector	Aerospace & Defense
CPRT	Copart Inc	61.10	Industrials Sector	Business Services
EFX	Equifax Inc	249.31	Industrials Sector	Business Services
MMM	3M Company	136.06	Industrials Sector	Conglomerates
CMI	Cummins Inc	283.67	Industrials Sector	Diversified Industrials
ETN	Eaton Corporation, PLC	275.62	Industrials Sector	Diversified Industrials
GE	GE Aerospace	193.61	Industrials Sector	Diversified Industrials
MWA	Mueller Water Products Inc	25.80	Industrials Sector	Diversified Industrials
DE	Deere & Co	456.44	Industrials Sector	Farm & Heavy Construction Machinery
FAST	Fastenal Company	80.23	Industrials Sector	Industrial Distribution
ASTS	AST SpaceMobile Inc	22.40	Technology Sector	Communication Equipment
VSAT	Viasat Inc	8.42	Technology Sector	Communication Equipment
ANET	Arista Networks Inc	70.75	Technology Sector	Computer Systems
STX	Seagate Technology Holdings PLC	78.06	Technology Sector	Computer Systems
APH	Amphenol Corp	71.14	Technology Sector	Electronic Components
BE	Bloom Energy Corporation	17.26	Technology Sector	Electronic Components
VRT	Vertiv Holdings LLC	77.91	Technology Sector	Electronic Components
FIS	Fidelity National Information Servi	79.42	Technology Sector	Information Technology Services
IBM	International Business Machines C	245.48	Technology Sector	Information Technology Services
LDOS	Leidos Holdings Inc	141.95	Technology Sector	Information Technology Services
DASH	DoorDash Inc	181.18	Technology Sector	Internet Content & Information
META	Meta Platforms Inc	520.40	Technology Sector	Internet Content & Information
PINS	Pinterest Inc	25.61	Technology Sector	Internet Content & Information
TEM	Tempus AI Inc	49.55	Technology Sector	Internet Content & Information

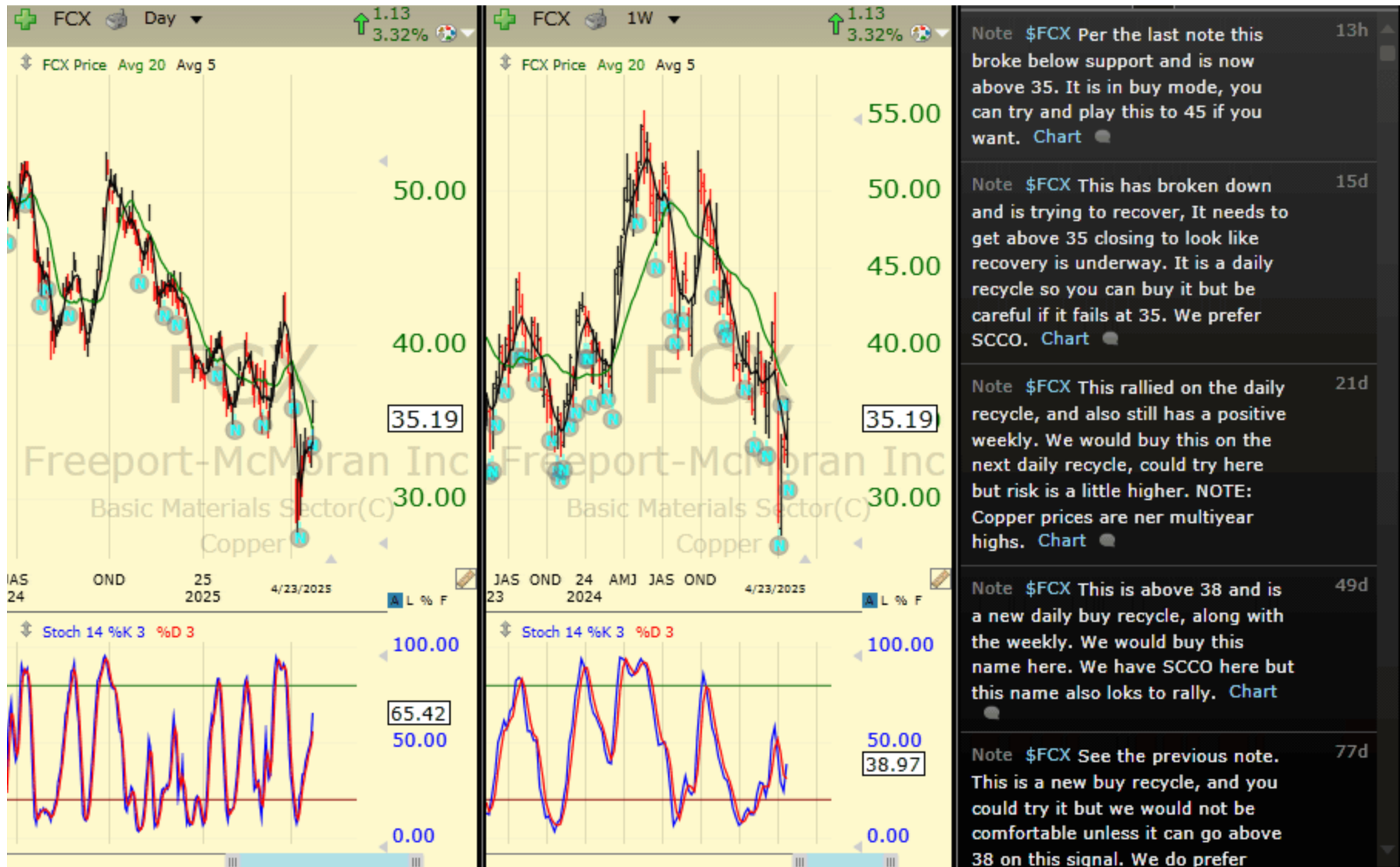
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BMI	Badger Meter Inc	210.43	Technology Sector	Scientific & Technical Instruments
AVGO	Broadcom Inc	176.66	Technology Sector	Semiconductors
MRVL	Marvell Technology Inc	53.76	Technology Sector	Semiconductors
NVDA	NVIDIA Corporation	102.52	Technology Sector	Semiconductors
APP	Applovin Corp	252.26	Technology Sector	Software - Application
MSTR	Microstrategy Inc	345.73	Technology Sector	Software - Application
ROP	Roper Technologies Inc	551.08	Technology Sector	Software - Application
MSFT	Microsoft Corp	374.04	Technology Sector	Software - Infrastructure
NET	Cloudflare Inc	112.80	Technology Sector	Software - Infrastructure
AES	The AES Corp	10.12	Utilities Sector	Utilities - Diversified
NEE	NextEra Energy	67.26	Utilities Sector	Utilities - Regulated Electric
FDD	First Trust DJ STOXX Select Divid	14.05		
FGD	First Trust Dow Jones Global Sele	24.52		
GDX	VanEck Vectors Gold Miners ETF	48.66		
GLD	SPDR Gold Trust	303.65		
HYG	iShares IBoxx \$ High Yield Corpor	78.00		
IGV	iShares S&P GSTI Software Index	88.89		
NAD	Nuveen Div Advtg Muni	11.04		
RVT	Royce Small-Cap Trust Inc	13.59		
THNPV	Technip Energies NV	33.2100		
VFLO	Victory Portfolios II VictoryShares	32.17		
XLG	Invesco S&P 500 Top 50 ETF	44.10		

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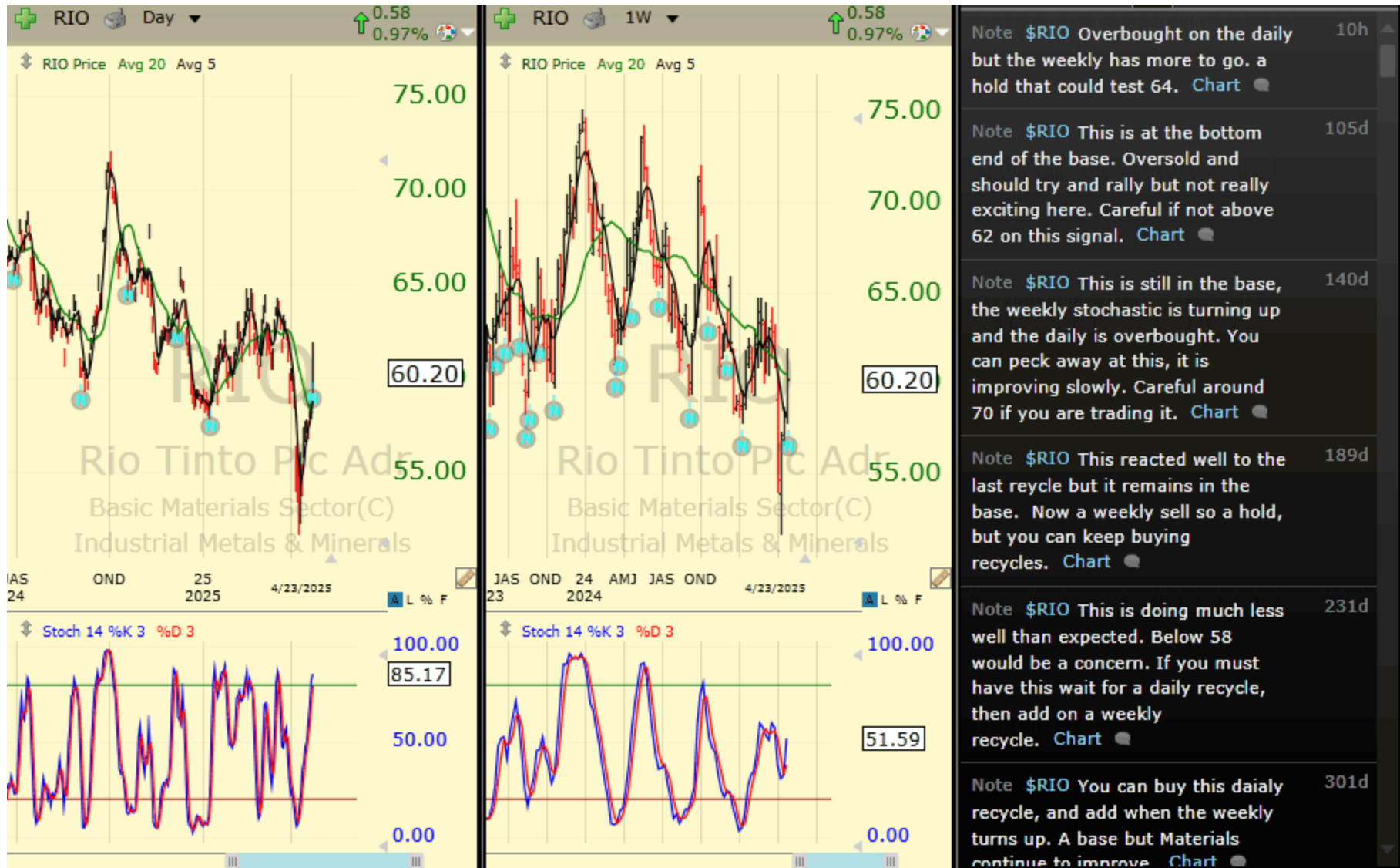
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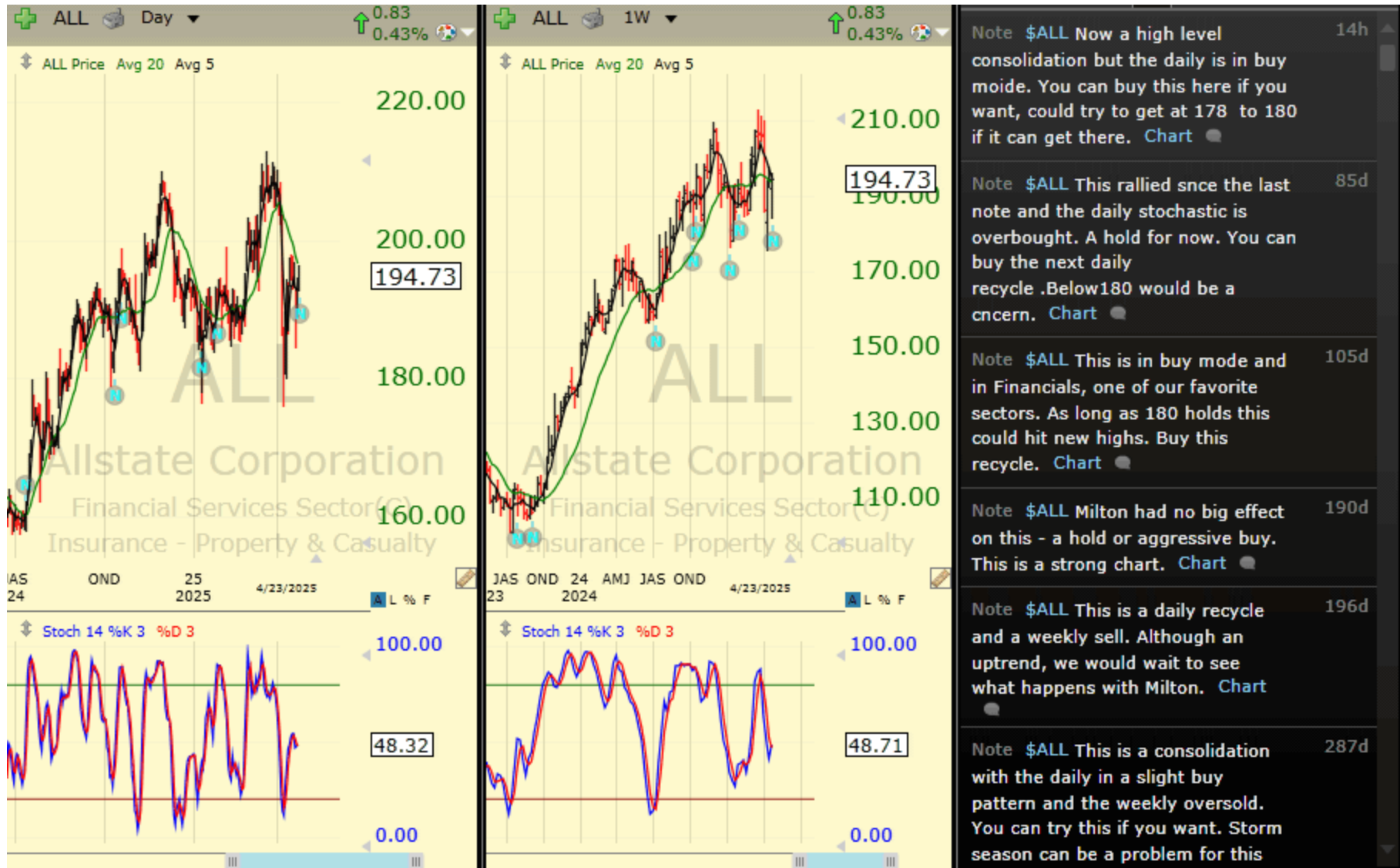
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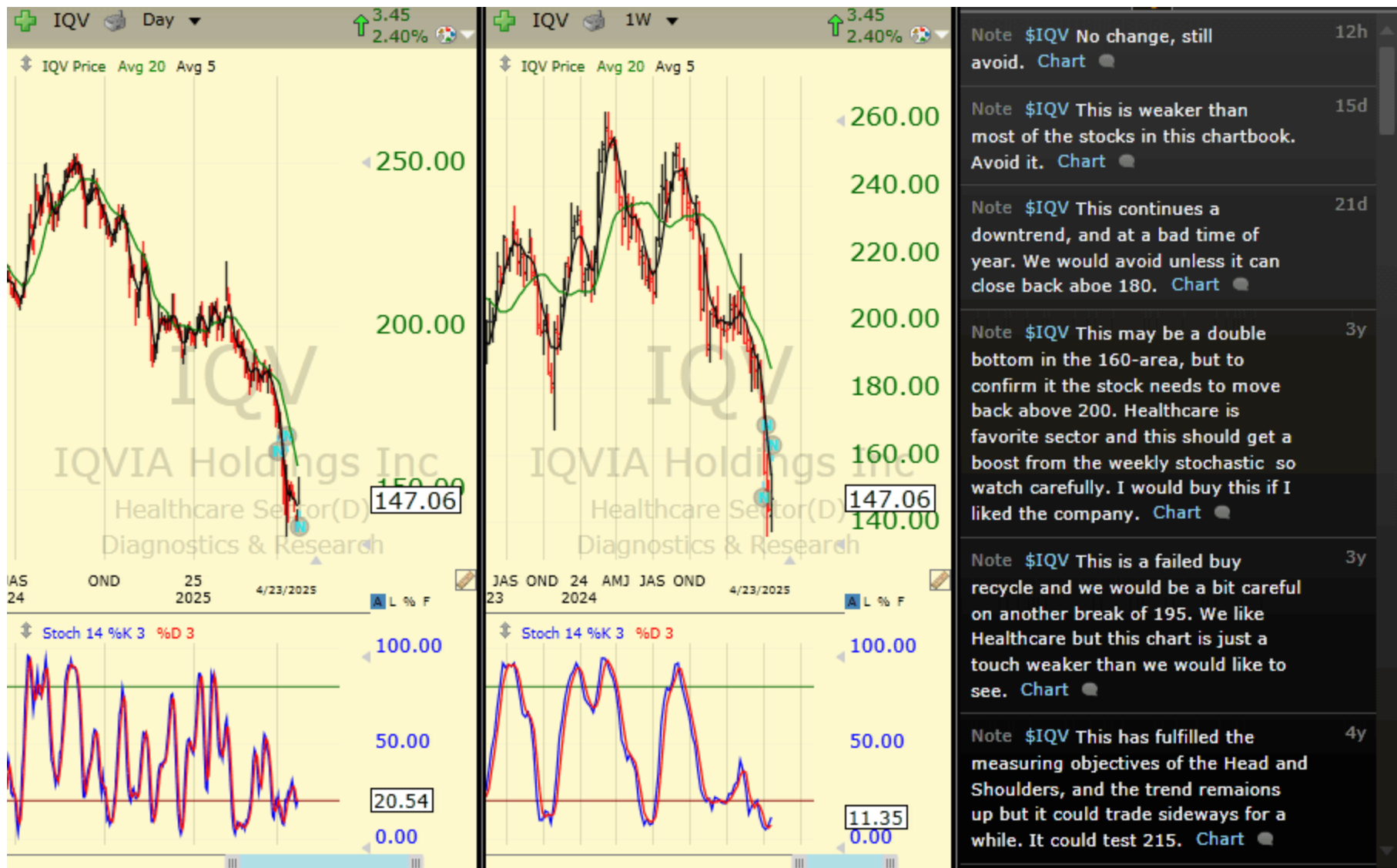
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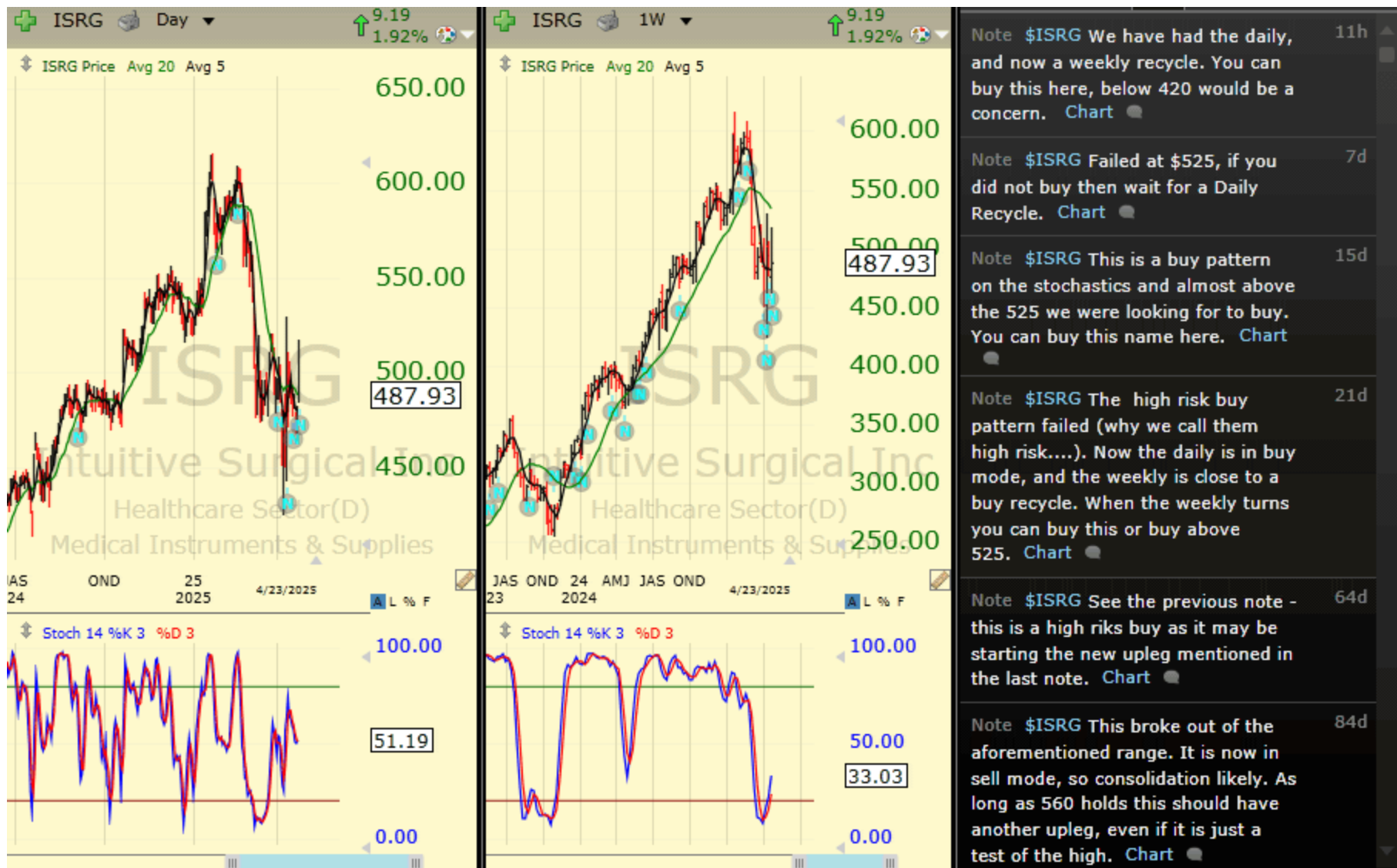
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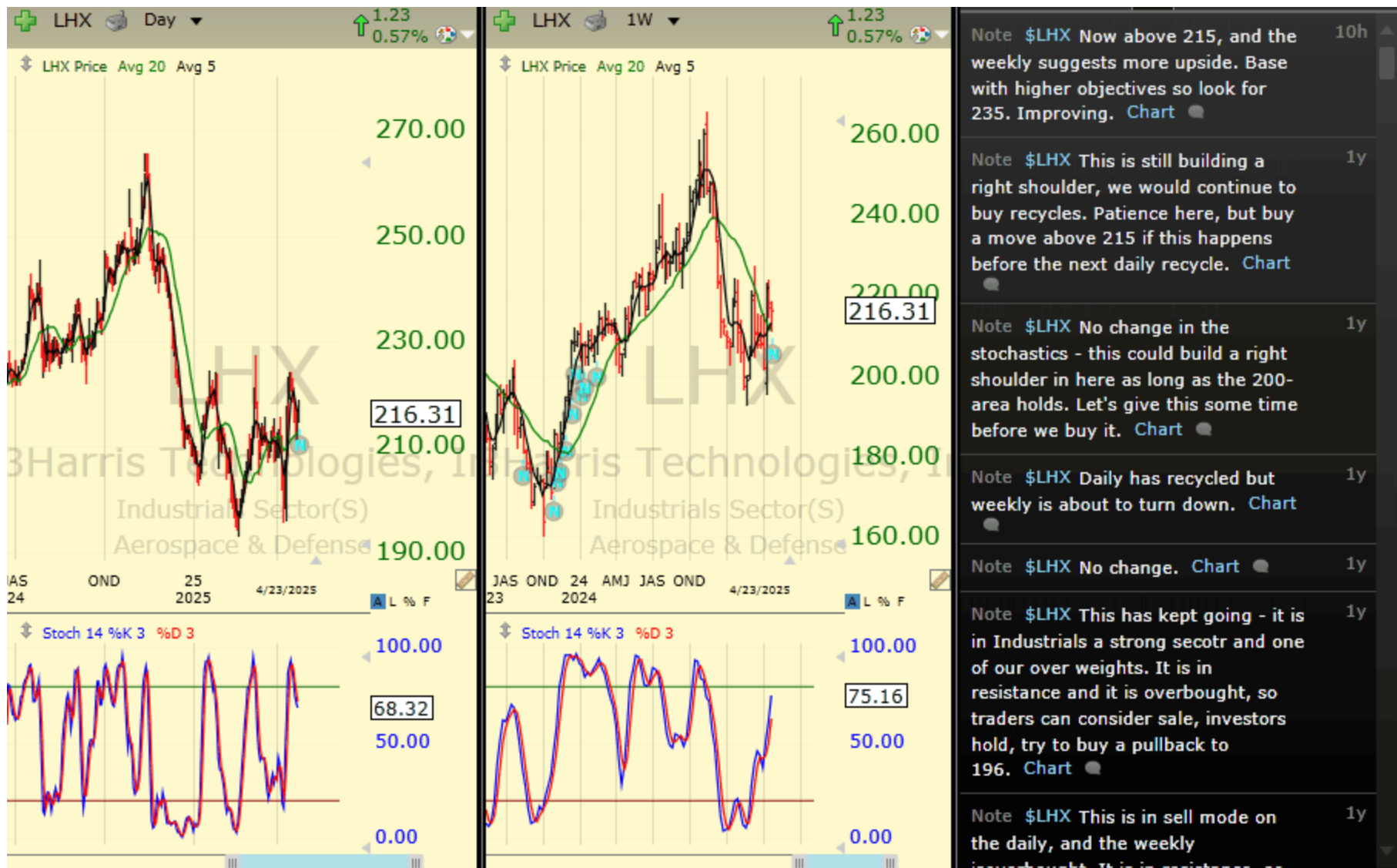
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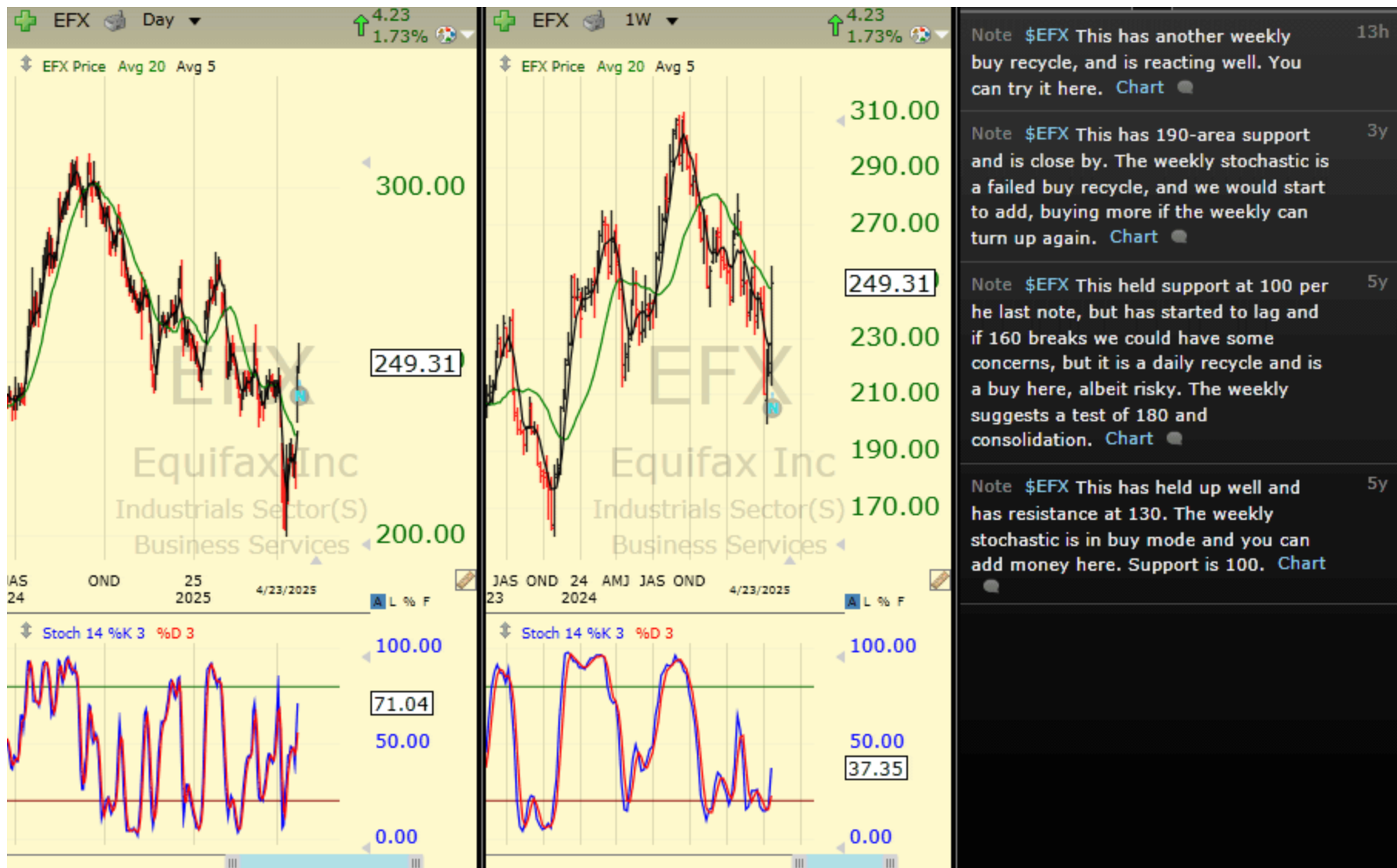
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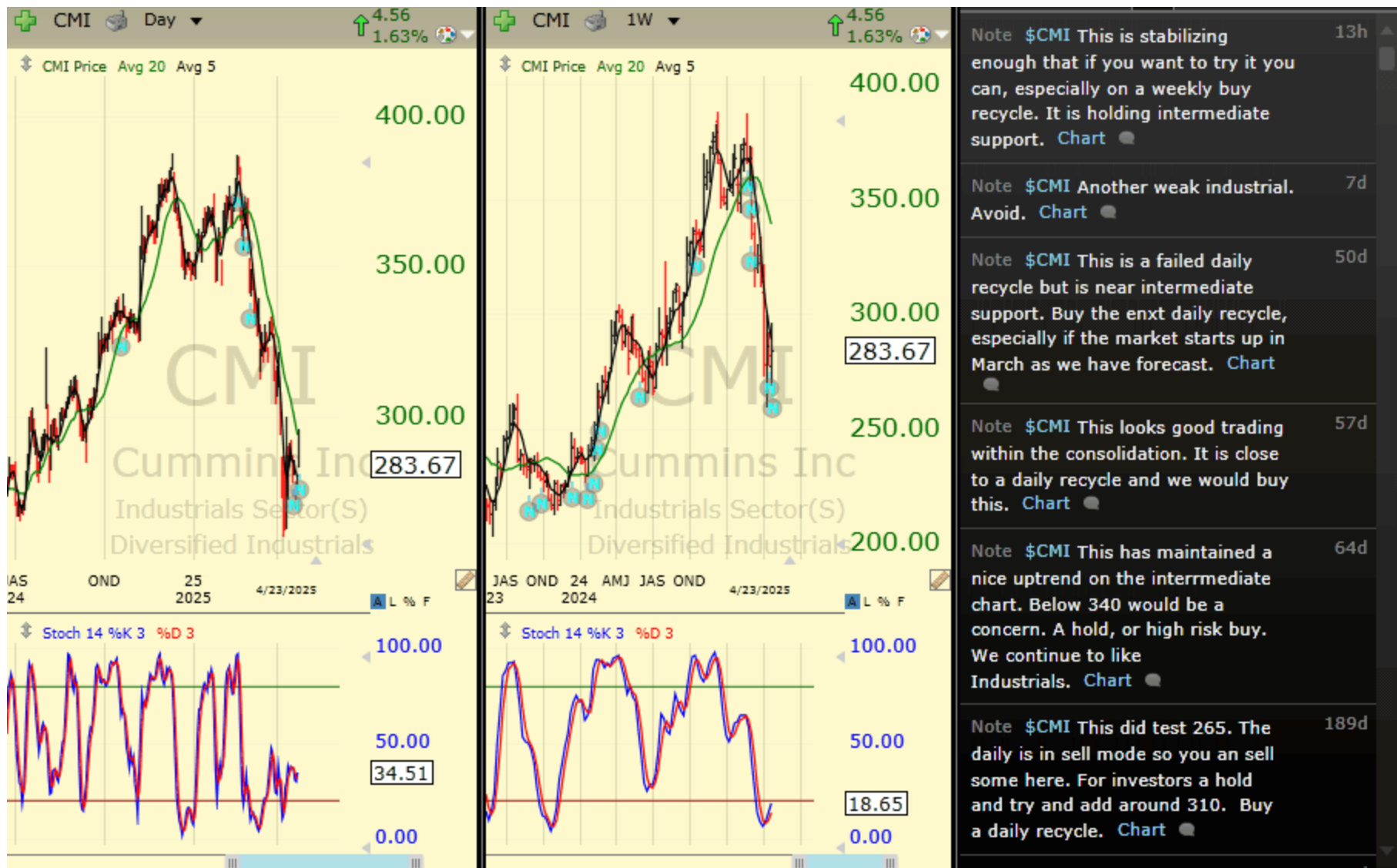
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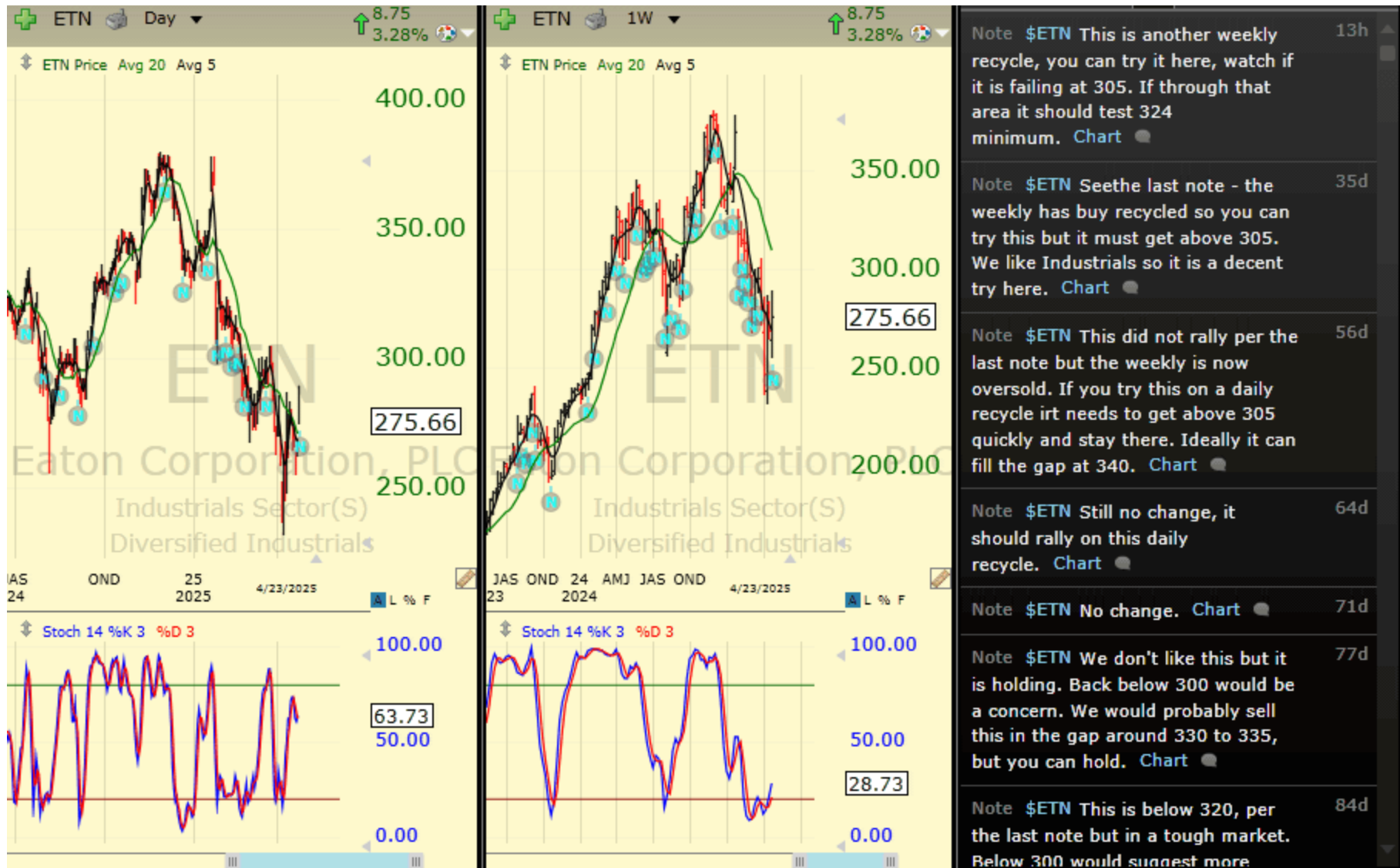
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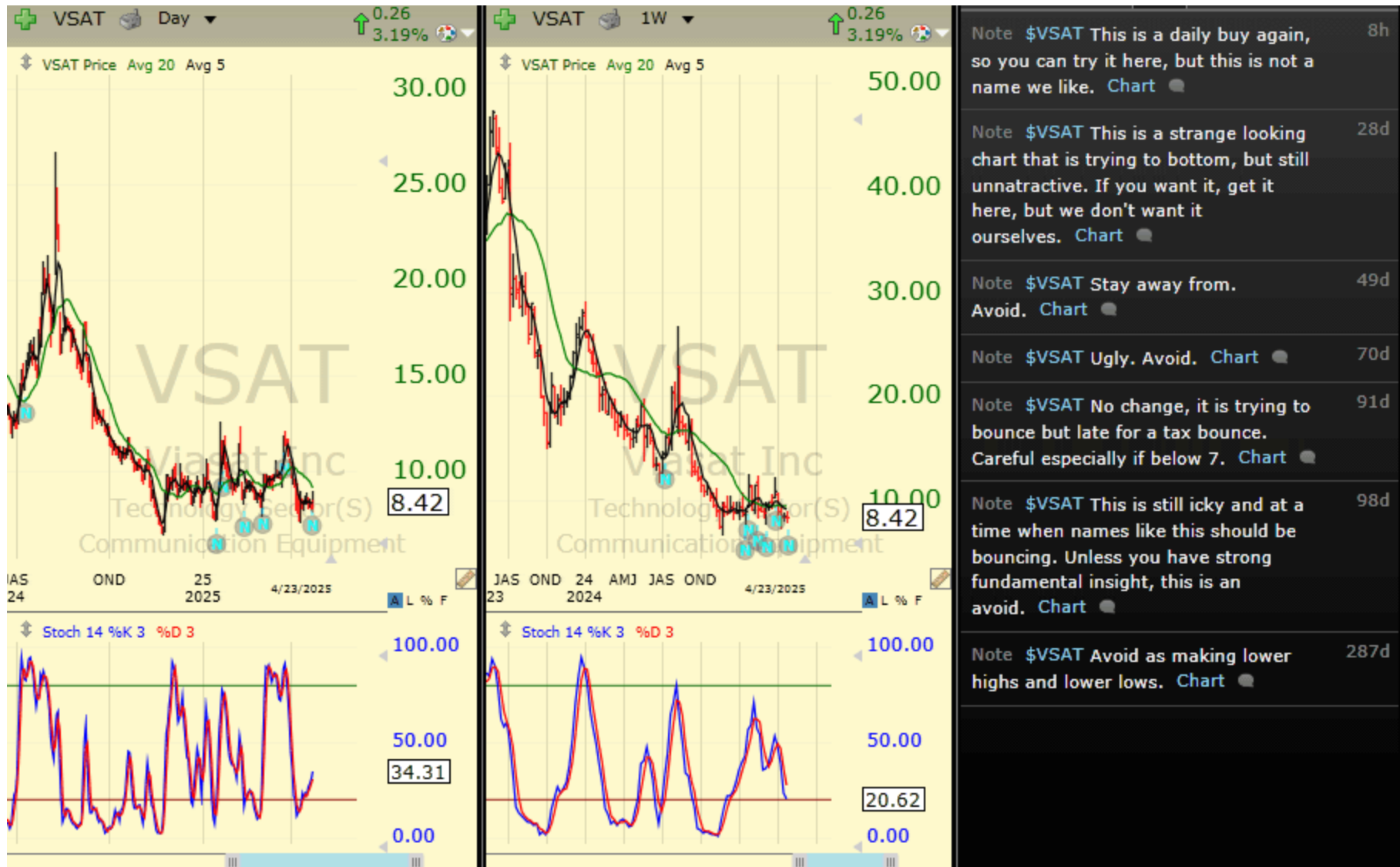
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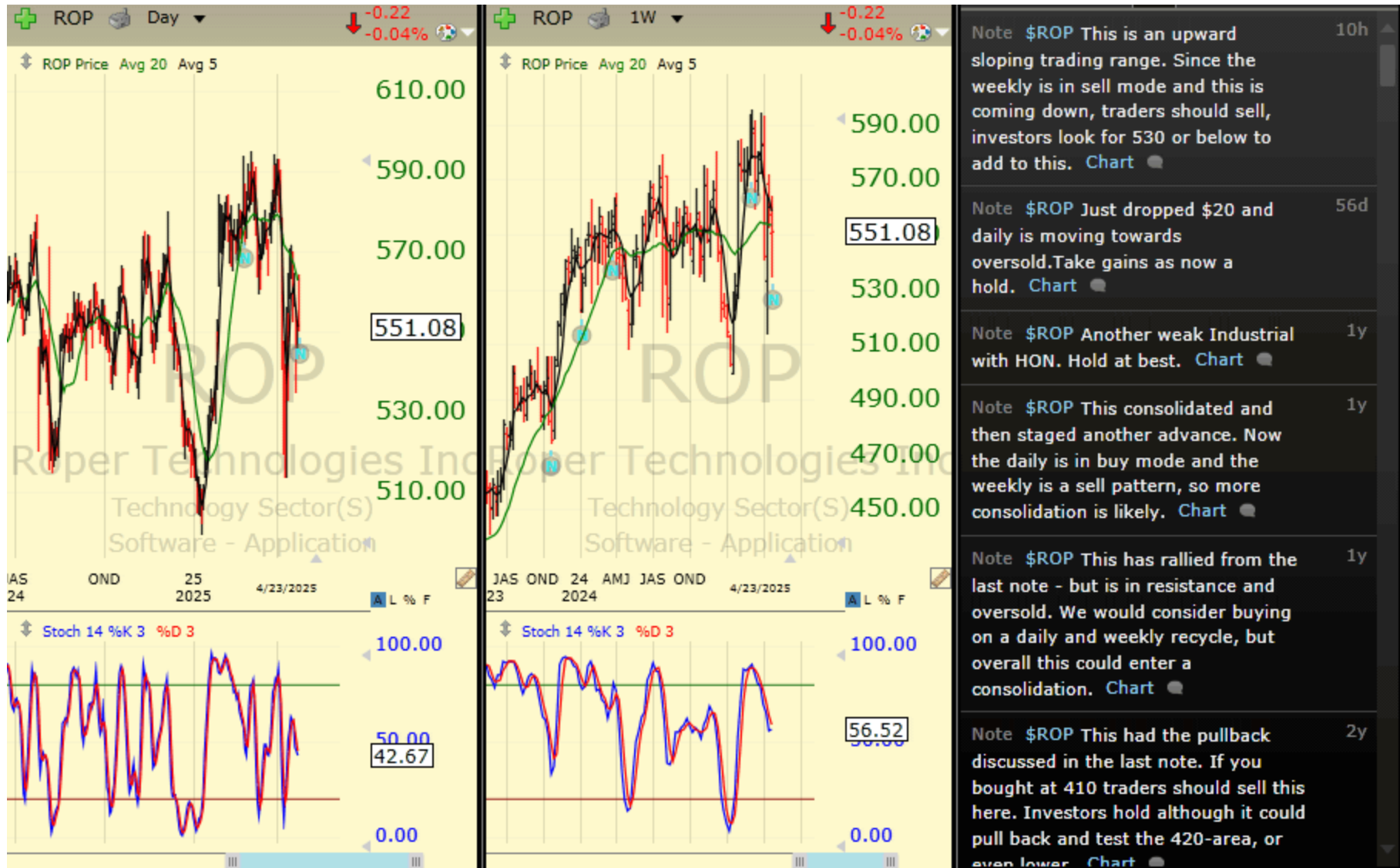
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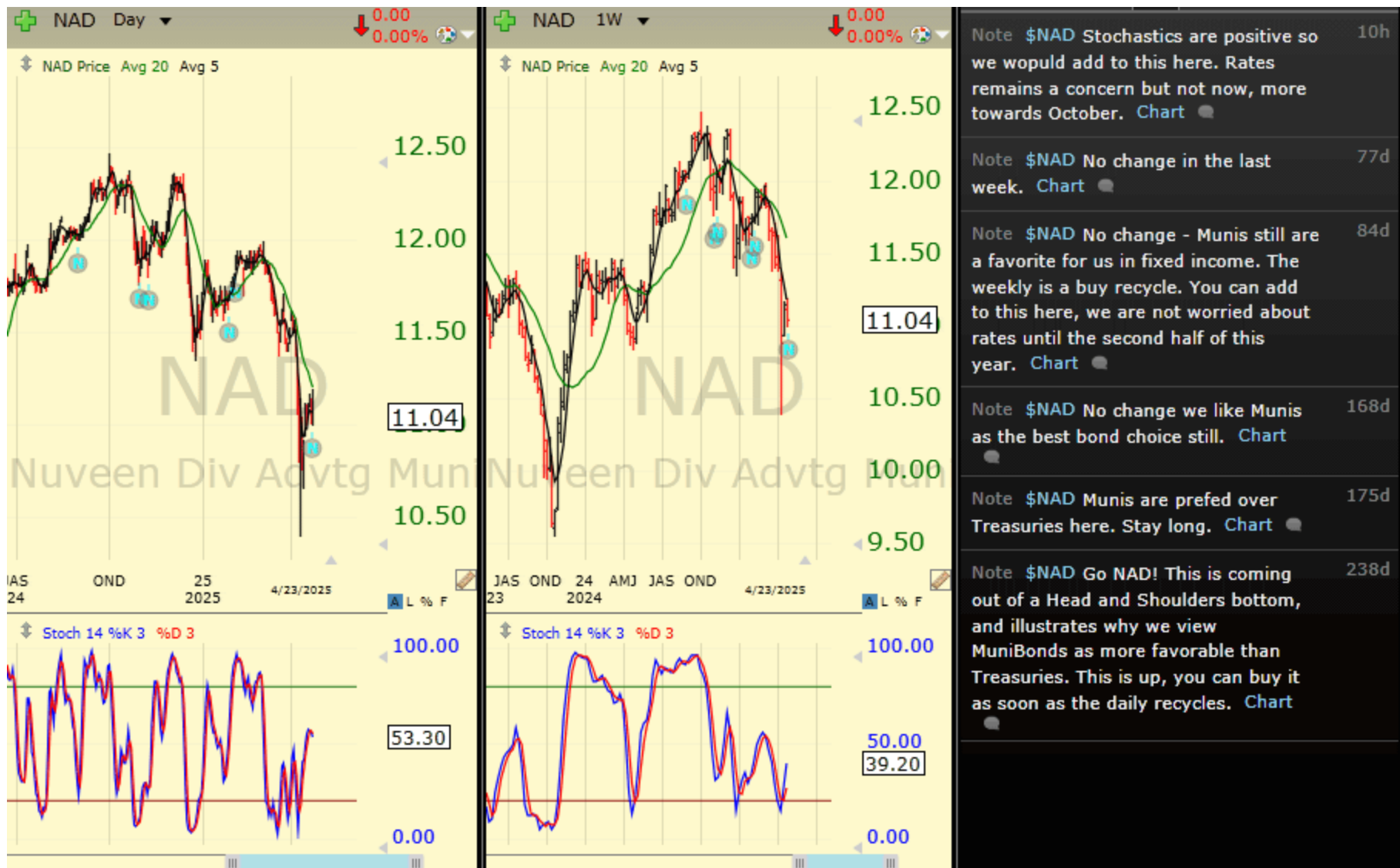
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Technical Indicators

Readers will note that we use the same indicators on all of the charts in this presentation. We append definitions of these indicators and are available via the website: [Education and Training Center](#).

Technicals Defined

Moving Averages:

Moving averages are one of the building blocks of Technical Analysis, and there are almost as many ways to use this indicator as there are technicians.

At the FRED report we teach and use a dual moving average crossover system to determine trend. Our favorites are the 5 period and 20 period moving averages. We consider the trend to be up if the 5 is above the 20, and down if below it.

Stochastics:

The Stochastic Oscillator is one of the commonly used momentum oscillators and is standard on charting programs. There are two lines on the chart below, %K and %D.

%K is the faster of the two lines, and represents a mathematical formula that *measures where the current close is in relation to the trading range of the last "X" periods of time*. We use a 14 period look-back, so in plain English %K says where the current close is in the trading range of the last 14 days, expressed as a %.

At the FRED report we use it somewhat differently than is commonly taught. The standard way to use the indicator is to register a buy signal when it moves below, and then above, 20 (the lowest 20% of closing prices in the last 14 days). A sell signal is when the indicator moves above, and then below 80 (the highest 80% of closes over the last 14 days).

The other line, %D, is a 3 period moving average of %K. We have found that the Stochastic is sensitive, so we advocate taking signals only in the direction of the trend. When looking at the standard FRED report chart, this would mean taking buy signals when the 5 is above the 20, and sell signals when the 5 is below the 20, but using a different technique to exit positions. The reason for this is the Stochastic is quite sensitive, and can give early indications, especially in new trends. It also can get "stuck" in the direction of trends, which connotes strength and not weakness. Another, preferred interpretation, is to use the indicator to measure risk. An example: buy in an uptrend, not when the stochastic is at 90% but rather wait until it falls below 50%. This way, even if a stock, commodity, or ETF does not give one of the "classic" signals, you can still use the indicator to assess risk, and leg into positions.

The FRED Report

Financial Research, Education & Data

The FRED Report (www.theFREDreport.com) was started to provide Financial Advisors and investors access to unbiased market research. The President of The Fred Report, **Fred Meissner, CMT** has been practicing Technical Market Analysis since 1983 and has worked in the research departments of Merrill Lynch and Robinson – Humphrey /Smith Barney. In addition he has served the public as a portfolio manager and financial advisor. We know the problems investors face and have devoted our career to helping find the best possible investments in all environments.

