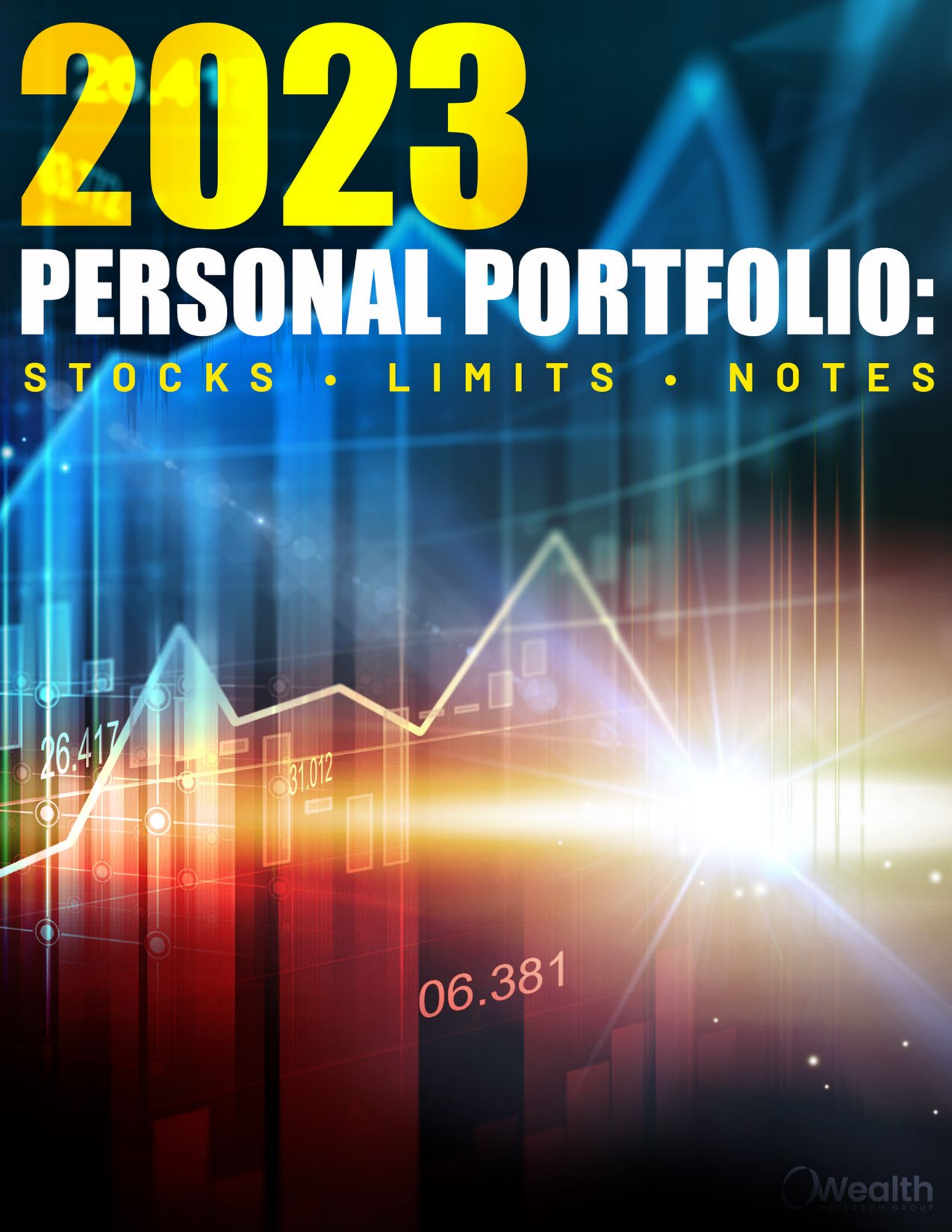


2023

PERSONAL PORTFOLIO:

STOCKS • LIMITS • NOTES



2023 PERSONAL PORTFOLIO: STOCKS • LIMITS • NOTES

This is my personal portfolio strategy for 2023, when it comes to the stock market.

I will be publishing throughout Q1 and Q2 what I actually love about each of these (2 short and concise reasons) and if there are any major updates, we'll do our best to update on these.

Lior Gantz -Chief Editor, Wealth Research Group



Advanced Micro Devices

amd.com

Global Leader in chips

Stock Ticker AMD	Ideal Entry Point 50-55	Dividend No	Net Income Yes	Risk Level Market
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Ansys

ansys.com

Global Leader in simulation software

Stock Ticker ANSS	Ideal Entry Point 200-220	Dividend No	Net Income Yes	Risk Level Low
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Axon

axon.com

Disruptor in Public safety for authorities - tasers and such.

Stock Ticker AXON	Ideal Entry Point 125-150	Dividend No	Net Income Verge of profitability	Risk Level Higher
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Axonics

axonics.com

Disruptor in untapped bowel and bladder control for women

Stock Ticker AXNX	Ideal Entry Point 44-50	Dividend No	Net Income No	Risk Level Higher
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- Any "LOW" risk stock should be considered on 5% dips or more, up to 5% of portfolio.
- Any "HIGH" risk stock should represent 1% of portfolio, at most.

- Any "HIGHER" risk stock should represent 1.5% of portfolio, at most.
- HIGH/HIGHER segment should not weigh over 25%, in total



Bill.com

bill.com [↗](#)

Disruptor in untapped fintech for small/mid size businesses

Stock Ticker BILL	Ideal Entry Point 90	Dividend No	Net Income No	Risk Level Higher
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Blackstone

blackstoneproducts.com [↗](#)

Global Legacy corporation in Private Equity, led by Schwartzman

Stock Ticker BX	Ideal Entry Point 62-72	Dividend Yes	Net Income Yes	Risk Level Market
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CBRE

cbre.com [↗](#)

No. 1 Commercial Real Estate Broker

Stock Ticker CBRE	Ideal Entry Point 64-67	Dividend No	Net Income Yes	Risk Level Low
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CrowdStrike

crowdstrike.com [↗](#)

Global cybersecurity leader/disruptor

Stock Ticker CRWD	Ideal Entry Point 90	Dividend No	Net Income No	Risk Level Market
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Cintas

cintas.com [↗](#)

Global leader in equipment for businesses

Stock Ticker CTAS	Ideal Entry Point 350-400	Dividend Yes	Net Income Yes	Risk Level Low
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Endava

endava.com [↗](#)

Disruptor in software optimization for next-gen technology

Stock Ticker DAVA	Ideal Entry Point 55-66	Dividend No	Net Income Yes	Risk Level Market
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Factset

factset.com [↗](#)

Global leader in financial data solutions

Stock Ticker FDS	Ideal Entry Point 350-380	Dividend Yes	Net Income Yes	Risk Level Low
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Fair Isaac Company

fico.com [↗](#)

Dominator in real estate credit (FICO SCORE)

Stock Ticker FICO	Ideal Entry Point 400-450	Dividend No	Net Income Yes	Risk Level Low
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Fortinet

cintas.com [↗](#)

Global cybersecurity leader

Stock Ticker FTNT	Ideal Entry Point 350-400	Dividend Yes	Net Income Yes	Risk Level Low
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Qualys

qualys.com [↗](#)

Cybersecurity

Stock Ticker QLYS	Ideal Entry Point 90	Dividend No	Net Income Yes	Risk Level Market
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Rexford Industrial Realty

rexfordindustrial.com [↗](#)

One-of-a-kind industrial REIT

Stock Ticker REXR	Ideal Entry Point 40-50	Dividend Yes	Net Income Yes	Risk Level Market
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Idexx Laboratories

idexx.com [↗](#)

Global leader in percare diagnostics

Stock Ticker IDXX	Ideal Entry Point 350-370	Dividend No	Net Income Yes	Risk Level Market
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Gartner

Niche research and consultancy firm

gartner.com

Stock Ticker IT	Ideal Entry Point 230-270	Dividend No	Net Income Yes	Risk Level Market
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Kinsale Capital

Global leader in niche insurance business: Excess and Surplus

kinsalecapitalpartners.com

Stock Ticker KNSL	Ideal Entry Point 190-245	Dividend Yes	Net Income Yes	Risk Level Market
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London Stock Exchange Group

Global dominator in EU stock exchanges

londonstockexchange.com

Stock Ticker LDNXF	Ideal Entry Point 80-85	Dividend No	Net Income Yes	Risk Level Low
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MarketAxess

Global niche bond exchange

marketaxess.com

Stock Ticker MKTX	Ideal Entry Point 250	Dividend Yes	Net Income Yes	Risk Level Market
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MSCI

Global dominator in ETFs

msci.com

Stock Ticker MSCI	Ideal Entry Point 400-450	Dividend Yes	Net Income Yes	Risk Level Low
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Nasdaq Inc.

Owner of NASDAQ

nasdaq.com

Stock Ticker NDAQ	Ideal Entry Point 55	Dividend Yes	Net Income Yes	Risk Level Low
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Cloudflare

Future of Internet - replacement of Cisco

cloudflare.com

Stock Ticker NET	Ideal Entry Point 34-38	Dividend No	Net Income No	Risk Level Market
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ServiceNow

Disruptor in SaaS for enterprise

servicenow.com

Stock Ticker NOW	Ideal Entry Point 300-340	Dividend No	Net Income Verge of profitability	Risk Level Market
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Pool Corp

No.1 pool company in America

poolcorp.com

Stock Ticker POOL	Ideal Entry Point 280-300	Dividend Yes	Net Income Yes	Risk Level Low
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RH

Premium luxury brand, furniture and expanding

rh.com

Stock Ticker RH	Ideal Entry Point 220-250	Dividend No	Net Income Verge of profitability	Risk Level Market
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Resmed

Sleep device dominator CPAP

resmed.com

Stock Ticker RMD	Ideal Entry Point 180-200	Dividend Yes	Net Income Yes	Risk Level Low
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Roper Technologies

Berkshire Hathaway of Tech companies

ropertech.com

Stock Ticker ROP	Ideal Entry Point 350-375	Dividend Yes	Net Income Yes	Risk Level Low
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SiteOne Landscape Supply

siteone.com [↗](#)

No.1 landscape retailer

Stock Ticker SITE	Ideal Entry Point 95-105	Dividend No	Net Income Yes	Risk Level Market
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S&P Global Intelligence

spglobal.com [↗](#)

Owner of S&P 500 and Financial ETFs

Stock Ticker SPGI	Ideal Entry Point 310	Dividend Yes	Net Income Yes	Risk Level Low
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The Trade Desk

thetradedesk.com [↗](#)

Future of advertisement

Stock Ticker TTD	Ideal Entry Point 35-40	Dividend No	Net Income Yes	Risk Level Market
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Zebra Technologies

zebra.com [↗](#)

No.1 Manufacturer in Several Categories

Stock Ticker ZBRA	Ideal Entry Point 220	Dividend No	Net Income Yes	Risk Level Market
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ZoomInfo

bill.com [↗](#)

Niche Leader in sales and solutions, data

Stock Ticker ZI	Ideal Entry Point Below \$25	Dividend No	Net Income Yes	Risk Level Higher
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Cellnex

zoominfo.com [↗](#)

NO.1 Cell tower in Europe

Stock Ticker BME: CLNX	Ideal Entry Point 30-33	Dividend Yes	Net Income No	Risk Level Low
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- Any "HIGH" risk stock should represent 1% of portfolio, at most.
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Adyen

Leading fintech in Europe

adyen.com

Stock Ticker AMS: ADYEN	Ideal Entry Point 1200-1300	Dividend No	Net Income Yes	Risk Level Market
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Moody's

Credit Risk Giant

moodys.com

Stock Ticker MCO	Ideal Entry Point 235	Dividend Yes	Net Income Yes	Risk Level Market
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Mettler-Toledo

Dominator in scales manufacturing

mt.com

Stock Ticker MTD	Ideal Entry Point 1100	Dividend No	Net Income Yes	Risk Level Market
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LPL Financial

No.1 broker-dealer in America

lpl.com

Stock Ticker LPLA	Ideal Entry Point 180	Dividend Yes	Net Income Yes	Risk Level Low
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Fiserv

Financial Services Giant

fiserv.com

Stock Ticker FISV	Ideal Entry Point 85	Dividend No	Net Income Yes	Risk Level Low
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- Whether the then current financial condition of the mining company permits such company to have the necessary capital to conduct exploration and/or mining activities.
- The need for financing for exploration and/or mining activities and the possible inability to obtain such financing at all or on acceptable terms or that does not cause significant dilution to shareholders' interests.
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- Status of the worldwide economy
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