MARKET
BEATER

Successful investing isn't about predicting the future.

It's about consistently making better decisions than the average investor.

Every market cycle introduces new opportunities, new risks, and new opinions about where stocks are headed next. While no investment strategy can eliminate uncertainty, disciplined investors understand that long-term success comes from following a repeatable process rather than reacting to short-term headlines.

That philosophy is the foundation of the Market Beater framework.

Rather than relying on emotion or speculation, Market Beater follows a systematic investment methodology designed to identify high-quality opportunities using objective criteria. Every recommendation is evaluated through the same disciplined process, helping investors make consistent decisions regardless of market conditions.

This report provides a transparent look at how that framework has historically performed.

Unlike many investment newsletters that showcase only their best trades, this report includes both strong performers and losing positions, portfolio statistics, benchmark comparisons, drawdown analysis, and representative trades. The objective is simple: provide investors with enough information to evaluate the strategy based on facts rather than marketing claims.

Historical Performance Snapshot

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Historical Performance Report

Historical performance summary

Performance report, Jan 2025 – Jun 2026.

STARTING PORTFOLIO **$10,000**	ENDING PORTFOLIO **$40,611.51**	TOTAL RETURN **306.12%**
MONTHLY WIN RATE **77.78%**	AVERAGE MONTHLY RETURN **9.00%**	BEST MONTH **43.03%**
WORST MONTH **-17.50%**	MAX DRAWDOWN **17.50%**	AVERAGE RECOVERY TIME **1.33 months**
	LONGEST RECOVERY **2 months**	

Past performance does not guarantee future results.

Covered Period
January 2025 through June 2026

$10,000	Starting Portfolio
$40,611.51	Ending Portfolio
306.12%	Total Return
77.78%	Monthly Win Rate
9.00%	Average Monthly Return
43.03%	Best Month
-17.50%	Worst Month
17.50%	Maximum Drawdown
1.33 month	Average Recovery Time
2 month	Longest Recovery

These results were generated across 108 completed trades, with 70 profitable positions and an overall trade win rate of 64.81%. Winning trades produced an average gain of 19.21%, while losing positions averaged 10.08%, resulting in a Profit Factor of 3.61 and an average expectancy of 8.91% per trade.

Perhaps the most important takeaway isn't that every trade was profitable.

It wasn't.

The strength of the framework comes from allowing successful investments to meaningfully outweigh losing ones while managing risk through a disciplined, repeatable process.

That balance has historically allowed the portfolio to compound capital significantly faster than the broader market over the same period.

The numbers above provide the high level picture. If you are looking for a more structured way to follow this type of disciplined investment process, Market Beater gives members access to the recommendations, updates, and framework behind these results.

Ready to follow the framework behind these results?

The numbers above provide the high-level picture. Market Beater gives members access to the recommendations, portfolio updates, and systematic framework behind this historical performance.

Become a Market Beater Member

Why Compare Against the S&P 500?

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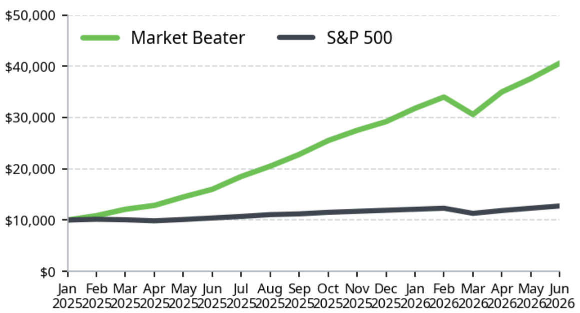
Market Beater vs. S&P 500

A benchmark comparison over the same 18-month period.



Metric	Market Beater	S&P 500
Ending Value	$40,611.51	$12,739.33
Total Return	306.12%	27.39%
Average Monthly Return	9.00%	1.43%
Monthly Win Rate	77.78%	61.11%
Sharpe Ratio	2.07	0.99

Outperformed the S&P 500 by 278.73 percentage points.

Every investment strategy should be measured against a benchmark.

For long-term investors, the most widely accepted benchmark is the S&P 500.

An investor can purchase a low-cost index fund in just a few minutes and historically achieve attractive long-term returns without actively selecting individual stocks. Any active investment strategy should therefore answer one important question.

Does it provide enough additional value to justify the extra effort?

Rather than comparing Market Beater against isolated winning trades or selectively chosen investments, this report compares the framework directly against the S&P 500 over the exact same period.

The difference is substantial.

During the covered period, a hypothetical $10,000 investment following the Market Beater framework grew to $40,611.51.

The same investment tracking the S&P 500 would have grown to $12,739.33.

Performance	Market Beater	S&P 500
Starting Value	$10,000	$10,000
Ending Value	$40,611	$12,739
Total Return	306.12%	27.39%
Average Monthly Return	9.00%	1.43%
Monthly Win Rate	77.78%	61.11%

This represents an outperformance of 278.73 percentage points over the same eighteen-month period.

While historical performance never guarantees future results, benchmarking against the market provides investors with valuable context. Rather than asking whether returns were positive, investors can evaluate whether the framework historically added value beyond simply investing in the broader market.

That comparison provides a much more meaningful measure of success thanhighlighting individual winning trades alone.

If outperforming the broader market is your goal, the key is not chasing random stock ideas. It is following a consistent process. Market Beater was built to give investors that process in a simpler, more structured way.

Looking for a more structured way to invest?
If outperforming the broader market is your goal, the key is not chasing random stock ideas. It is following a consistent process. Market Beater was built to give investors that process in a simple, structured way.

Start Following Market Beater

Understanding the Numbers

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Understanding the numbers

Key performance metrics at a glance.

TOTAL TRADES 108	WINNING TRADES 70	LOSING TRADES 37
TRADE WIN RATE 64.81%	AVERAGE GAIN (WINNERS) 19.21%	AVERAGE LOSS (LOSERS) -10.08%
PROFIT FACTOR 3.61	EXPECTANCY PER TRADE 8.91%	SHARPE RATIO 2.07
	MAX DRAWDOWN 17.50%	

Metrics shown for Jan 2025 – Jun 2026, based on Market Beater provided data.

Performance statistics become much more valuable when investors understand what they actually represent.

For example, many investors focus exclusively on total return.

While total return is important, it tells only part of the story.

Equally important is understanding how those returns were achieved.

During the covered period, the framework produced positive monthly returns nearly 78 percent of the time. Periods of weakness occurred, but the average recovery from a portfolio drawdown was just 1.33 months, with no recovery lasting longer than two months.

This demonstrates an important characteristic of disciplined investing.

Short-term declines are unavoidable.

Remaining invested in a structured process often matters more than avoiding every period of volatility. Another useful measurement is Profit Factor, which compares the total profits generated by winning trades to the total losses generated by losing trades.

Market Beater produced a Profit Factor of 3.61, meaning the strategy historically generated more than three dollars of profit for every dollar lost.

Likewise, the framework achieved a Sharpe Ratio of 2.07, compared with 0.99 for the S&P 500 over the same period.

While many investors may not be familiar with the Sharpe Ratio, its purpose is straightforward.
It measures how much return was generated for each unit of risk taken.

Generally speaking, a higher Sharpe Ratio indicates that returns were achieved more efficiently rather than simply by accepting additional volatility.

No single statistic should ever be viewed in isolation.

Taken together, however, these measurements provide a much more complete understanding of how the framework has historically behaved.

A Commitment to Transparency

One of the biggest problems within the investment industry is selective reporting.

Many services proudly advertise their biggest winners while quietly ignoring trades that failed to meet expectations.

That approach creates unrealistic expectations and prevents investors from understanding how a strategy actually performs.

Market Beater takes a different approach.

This report includes both successful investments and losing positions because every investment strategy experiences both.

Understanding how losses are managed is often just as important as understanding how winners are identified.

The objective is not perfection.

The objective is disciplined execution.

Over time, consistently following a repeatable investment process has historically produced stronger long-term outcomes than reacting emotionally to short-term market movements.

The remainder of this report examines representative trades, portfolio behavior during periods of volatility, and the risk management principles that have guided the framework throughout the covered performance period.

Representative Trades

Portfolio statistics tell an important story, but numbers alone never capture the full picture.

The purpose of this section is to demonstrate how the Market Beater framework operates across different market conditions using actual historical trades. Rather than selecting only the portfolio's biggest winners, we've included a range of investments that illustrate different outcomes, including exceptional performers, moderate gains, and losing positions.

No investment strategy succeeds on every trade.

What matters is maintaining a disciplined process that consistently identifies favorable opportunities while managing risk when markets move in the opposite direction.

As you review these examples, pay attention to the consistency of the decision-making process rather than the return of any individual investment. The objective is not to find one stock that changes your financial future. It is to repeatedly apply a proven framework across many investments over time.

Representative Trade 1

Micron Technology (MU)

Representative Trade Report

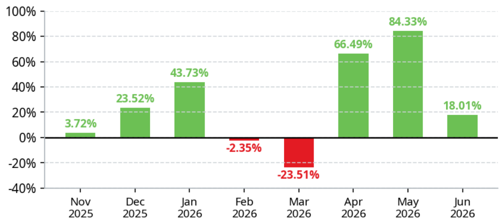
Representative trade: Micron Technology (MU)

An example of disciplined patience with a strong trend.

TRADE FACTS

HOLDING PERIOD	8 months
ENTRY DATE	Oct 31, 2025
ENTRY PRICE	$228.57
EXIT DATE	Jun 30, 2026
EXIT PRICE	$1,138.50
TOTAL RETURN	398.11%

MONTHLY RETURNS



COMMENTARY This trade highlights the value of staying with a strong opportunity while the broader trend remains intact. Although volatility appeared along the way, the framework allowed a major winner to develop over time.

Past performance does not guarantee future results.

Ready to follow the Market Beater framework?

Market Beater gives members access to the recommendations, portfolio updates, performance tracking, and disciplined investment process outlined throughout this report.

Become a Market Beater Member

October 31, 2025 through June 30, 2026

Holding Period

8 Months

Time in Portfolio

$228.57

Entry Price

$1,138.50

Exit Price

398.11%

Total Return

This investment represents one of the strongest performers during the covered period and demonstrates the value of allowing exceptional opportunities sufficient time to develop.

Rather than attempting to capture a quick gain, the framework maintained the position as long as the underlying investment thesis remained intact. Although the position experienced periods of normal volatility, including multiple monthly declines, the overall trend continued to support remaining invested.

One of the most important lessons from this trade is that outstanding long-term returns rarely occur in a straight line. Even exceptional investments experience temporary pullbacks that can tempt investors to exit prematurely. A disciplined framework helps remove that emotion by focusing on predefined decision criteria instead of short-term price movements.

By remaining patient while the investment continued to satisfy the framework, the position ultimately produced nearly a fourfold return over the holding period.

Representative Trade 2

MicroStrategy (MSTR)

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Representative Trade Report

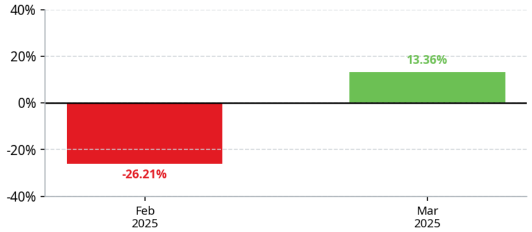
Representative trade: MicroStrategy (MSTR)

An example of disciplined risk management.

TRADE FACTS

HOLDING PERIOD	2 months
ENTRY DATE	Jan 31, 2025
ENTRY PRICE	$345.44
EXIT DATE	Mar 31, 2025
EXIT PRICE	$288.95
TOTAL RETURN	-16.35%

MONTHLY RETURNS



COMMENTARY This trade illustrates how the framework manages losing positions. When price action weakened the original thesis, the position was exited according to the rules, helping preserve capital for future opportunities.

Past performance does not guarantee future results.

Jan 31, 2025 through March 31, 2025	2 Months	$345.44	$288.95	-16.35%
Holding Period	Time in Portfolio	Entry Price	Exit Price	Total Return

Every investment strategy experiences losing trades.

The difference between disciplined investing and emotional investing is often determined by how those losses are handled.

This position illustrates exactly that principle.

Although the investment initially met the framework's selection criteria, subsequent price action weakened the original thesis. Rather than allowing hope to dictate future decisions, the framework exited the position according to its established rules.

Accepting manageable losses is a necessary part of successful investing.

Trying to avoid every losing trade often results in larger losses, delayed decision making, and unnecessary emotional stress. By controlling downside risk and preserving capital, the framework remains positioned to participate in future opportunities with significantly greater potential.

One losing position does not determine long-term performance.

A disciplined investment process does.

Representative Trade3

GE Vernova (GEV)

Jan 31, 2025 through October 31, 2025	Holding Period
9 Months	Time in Portfolio
$382.94	Entry Price
$577.75	Exit Price
50.86%	Total Return

Not every successful investment produces extraordinary returns.

Many of the strongest portfolios are built through the accumulation of consistent, above-average gains across multiple investments.

GE Vernova demonstrates this principle well.

During its nine-month holding period, the investment experienced both positive and negative months. Rather than reacting to every period of short-term volatility, the framework remained focused on the broader trend.

This disciplined approach ultimately produced a return exceeding 50 percent while avoiding unnecessary trading activity

Investors often underestimate how meaningful multiple moderate winners become when compounded together over time.

Representative Trade 4

AppLovin Corporation (APP)

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Representative Trade Report

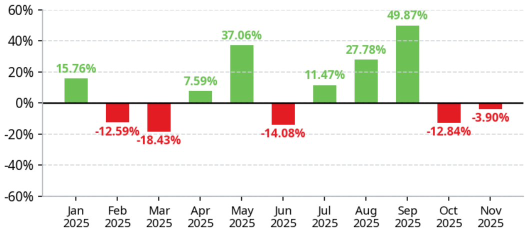
Representative trade: AppLovin Corporation (APP)

An example of patience through volatility.

TRADE FACTS

HOLDING PERIOD	11 months
ENTRY DATE	Dec 31, 2024
ENTRY PRICE	$320.90
EXIT DATE	Nov 28, 2025
EXIT PRICE	$600.05
TOTAL RETURN	86.98%

MONTHLY RETURNS



COMMENTARY This trade shows that strong investments rarely move higher every month. Despite multiple pullbacks, the framework remained focused on the broader trend and ultimately led to a strong compounded return.

Past performance does not guarantee future results.

DEC 31, 2024 through nov 28, 2025	11 Months	$320.90	$600.05	86.98%
Holding Period	Time in Portfolio	Entry Price	Exit Price	Total Return

AppLovin demonstrates another important characteristic of disciplined investing.

Strong investments rarely produce positive returns every month.

Throughout the holding period, the position experienced several meaningful pullbacks, including multiple double-digit monthly declines. Investors relying primarily on emotion might have exited the position long before its strongest gains occurred.

Instead, the framework continued evaluating the investment according to its established criteria rather than reacting to temporary market volatility.

The result was a nearly 87 percent compounded return over eleven months.
This trade reinforces one of the central themes of the Market Beater philosophy.
Patience is often rewarded when supported by a disciplined investment process.

Managing Risk Through Discipline

Many investors assume successful investing is primarily about finding winning stocks.
In reality, portfolio management plays an equally important role.

Every recommendation represents only one decision.

Managing that investment after it enters the portfolio often has an even greater influence on long-term performance.

The Market Beater framework approaches risk management through consistency rather than prediction.

Positions are not increased because excitement surrounding a stock has grown.
They are not sold because headlines become temporarily negative.

Instead, every investment continues to be evaluated using the same objective framework that justified entering the position in the first place.

This consistency helps reduce one of the largest sources of underperformance among individual investors: emotional decision-making.

Markets will always fluctuate.
News headlines will always create uncertainty.
Short-term volatility will always exist.
The framework cannot eliminate those realities.

What it can do is provide investors with a structured process for navigating them with greater confidence and discipline.

By consistently applying the same methodology across every investment, Market Beater seeks to improve decision quality over time while allowing the mathematics of disciplined investing and long-term compounding to work in the investor's favor.

Understanding Risk and Drawdowns

Every investment strategy experiences periods where portfolio values decline.

That isn't a flaw in the strategy. It's simply the reality of investing.

The important question isn't whether drawdowns occur.

The important question is how severe they become, how they're managed, and how quickly the portfolio historically recovers.

Stay disciplined through market volatility

For many investors, the real challenge is not finding opportunities. It is staying disciplined when markets move. Market Beater helps members follow a systematic framework instead of reacting emotionally to short-term market movement.

Join Market Beater

Looking Beyond Returns

Most investors immediately focus on total return.

While total return is important, it only tells part of the story. Understanding how those returns were generated often matters just as much.

During the covered period, the Market Beater framework completed 108 trades. Of those, 70 were profitable, producing an overall trade win rate of 64.81%.

At first glance, some investors may expect successful strategies to win nearly every trade. In reality, that expectation is neither realistic nor necessary.

The average winning trade generated a gain of 19.21%, while the average losing trade declined 10.08%. This relationship is one of the most important reasons the framework has historically produced attractive long-term performance.

Another important measurement is Annualized Volatility, which shows how much the portfolio's value moved when expressed as a yearly rate.

During the covered period, the Market Beater framework had annualized volatility of 50.54%. That may seem high compared with a broad market index, but volatility should not be viewed by itself. It should be evaluated alongside total return, drawdown, recovery time, and risk-adjusted performance.

Higher-return strategies often experience larger short-term movements than passive index funds. The key question is not whether volatility exists. It is whether investors were historically compensated for accepting that volatility.

In this case, the framework generated a 306.12% total return, experienced a 17.50% maximum drawdown, recovered from drawdowns in an average of 1.33 months, and produced a Sharpe Ratio of 2.07.

Taken together, those numbers suggest that the portfolio's volatility was historically paired with strong return generation and relatively quick recovery periods.

Volatility does not automatically mean something is wrong. It simply means the portfolio moves. The goal is not to avoid movement entirely, but to follow a disciplined framework that helps investors stay objective when those movements occur.

Final Thoughts

These measurements demonstrate why professional investors evaluate portfolios using multiple statistics rather than relying solely on total return.

Each metric contributes another piece to understanding the overall quality and consistency of an investment strategy.

What Investors Should Expect

No investment strategy delivers positive returns every month.
No framework eliminates uncertainty.
No portfolio rises in a perfectly straight line.
Market Beater is no exception.

Investors should expect periods where the strategy significantly outperforms the broader market.
They should also expect periods where returns are more modest, individual positions decline, or market volatility temporarily affects portfolio performance.

Those periods are a normal part of long-term investing.
What should remain consistent is the investment process itself.
The purpose of the Market Beater framework is not to predict every market movement.
Its purpose is to provide investors with a structured methodology that removes much of the emotion from investment decisions while maintaining a long-term perspective.
Investors who approach the framework with realistic expectations are far more likely to remain disciplined during periods of market uncertainty.
History has repeatedly demonstrated that emotional decisions often create larger setbacks than market volatility itself.

Consistency, patience, and disciplined execution remain the foundation of successful long-term investing.

The financial markets will continue to change.

New technologies will emerge.

Economic conditions will improve and deteriorate.

Headlines will become optimistic, then pessimistic, then optimistic again.

Those cycles have repeated throughout history, and they will continue long into the future.

What doesn't need to change is the quality of your decision-making.

The purpose of the Market Beater framework is to provide investors with a repeatable process that replaces emotion with discipline and speculation with structure.
Rather than asking investors to rely on bold predictions or marketing promises, we've chosen a different approach.

Show the data.
Show the winners.
Show the losers.
Show the benchmark.

Allow investors to evaluate the results for themselves.
The historical performance presented throughout this report represents a snapshot of how the framework has behaved through actual market conditions between January 2025 and June 2026. As additional months of data become available, this report will continue to evolve, providing an even more comprehensive picture of the strategy over time.

While past performance can never guarantee future results, disciplined investing has always been built upon one simple principle.

Make consistently better decisions.

Repeat that process over time.

Allow compounding to do the rest.

Ready to Take the Next Step?

Reading about a disciplined investment framework is one thing.
Following one consistently is another.

Market Beater gives members access to the recommendations, portfolio updates, performance tracking, and systematic investment process outlined throughout this report.

If you are looking for a simpler, more structured alternative to emotional decision making, Market Beater was built to help you invest with greater confidence and discipline.

Become a Market Beater member today and start following the same framework that has historically transformed a hypothetical $10,000 portfolio into more than $40,000 while maintaining a transparent view of both wins and losses.

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