

May SSR Portfolio Update

There is one portfolio deletion and one portfolio addition for the SSR tracking portfolio in May.

For more information on this month's portfolio changes, read the [May SSR Monthly Report](#).

April Market Recap

Geopolitics dominated the financial headlines in April. Rising tensions between the U.S and North Korea have had world markets on edge in recent weeks, while global stock markets rallied at the end of the month after a centrist candidate won the first round of France's presidential election.

Here at home, investors have been digesting generally strong corporate earnings, mixed economic data and a draft tax plan from the Trump administration that reportedly cuts the corporate tax rate to 15% from the current range of 15% to 35%.

Through it all, U.S. stocks have, for the most part, regained the upward momentum that abandoned them last month. For the month, through the close of April 28, the iShares DJ U.S. ETF (**IYY**) is up 1.0% after losing 0.3% in March. For April, the SSR tracking portfolio lagged its IYY benchmark but still gained 0.5% for the month. As of the close on April 28, 15 of the 36 SSR stocks held in the SSR tracking portfolio at the end of March have posted a monthly gain, while 21 are down.

Looking at the performance of the individual groups, the stocks in Group 3, on average, were the strongest performers in April. The group was buoyed by having four of the portfolio's top five monthly performers. Groups 1 and 4 were the laggards this month, as the average stock in Group 1 was generally flat while the average Group 4 stock was down in April.

Earnings Season Update

This week, one-third of the companies in the SSR tracking portfolio (12 in all) reported results from the first calendar quarter of 2017. All but two posted earnings that exceeded their consensus estimates. This week's portfolio news has more detailed information on the results of these companies.

Through the end of this week, 20 of the 36 stocks in the SSR portfolio have reported their quarterly

results for the current earnings season. Eighteen have reported positive earnings surprises while two companies reported earnings that fell short of estimates. So far for this earnings season, the median earnings surprise for the SSR companies is +4.2%.

SSR Portfolio

Year to date through the close on April 28, the SSR tracking portfolio has gained 7.7%, while the iShares DJ U.S. ETF (IYY) has gained 6.8%. Since inception, the iShares DJ U.S. fund is up 239.9%, while the SSR portfolio has gained 191.1%.

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Click [here](#) for news on the current SSR holdings and weekly performance data.

The Stock Superstars Report (SSR) publication was developed to educate individual investors on how to build a stock portfolio using a mix of strategies. The SSR is designed to provide all the information you need to manage a stock portfolio as well as to teach you about timely investment principles relating to the SSR portfolio and stock investing in general.