

Monitor's Quarterly Report on Individual Stocks

Complete a new Stock Selection Guide before filling out this form

See Helpful Hints: Quarterly Report for filling out this report

Date: _____ Report by: _____
Name of Stock: _____ Ticker: _____
Fiscal year ends (date): _____ Date of most current Value Line: _____
Which Quarter (1st, 2nd, 3rd, 4th): _____

Monthly Information:

- _____ shares owned at a cost per share of \$ _____
- Current price is _____. Last month it was _____. Price is (up, down) _____ %.
- Fifty-two week high _____ and low _____ prices.
- Zoning: The stock is in the (buy, hold, sell—circle the appropriate zone) based on the most recent SSG.
Buy range: _____ to _____. Hold: _____ to _____. Sell: _____ to _____.
- Current PE is _____ (PE taken from _____). Last month it was _____.
Industry PE is _____. Projected Industry PE is _____.
- At its current price, the stock has a relative value of _____. The stock (is, is not—circle appropriate choice) in the buy range based on a relative value between 90-110%.

Current Quarter's Information:

- Report on the items below if there has been a **CHANGE** from the previous quarter.
 - Timeliness _____ (same, raised or lowered) and Safety _____ (same, raised or lowered)
 - Insider ownership has (increased, decreased, or same) from _____ % to _____ %
 - Institutional ownership has (increased, decreased, or same) from _____ % to _____ %
 - Total debt has (increased, decreased, or same) from \$ _____ to \$ _____. The % of total debt to total capitalization has (increased, decreased, or same) from _____ % to _____ %.
 - Judgment in projected future sales and earnings growth (SSG: Visual Analysis Section), high and low projected prices (SSG: Section 4), and total return values (SSG: Section 5)

- Growth statistics for the current quarter:

| | Most recent quarter | Quarter a year ago | Percent change | Projected in SSG |
|-----------|---------------------|--------------------|----------------|------------------|
| Sales: | \$ _____ | \$ _____ | _____ % | _____ % |
| Earnings: | \$ _____ | \$ _____ | _____ % | _____ % |

Does the % change meet your benchmark (e.g. a 10% change each quarter)? Yes _____ No _____

- The upside/downside ratio is _____ to 1.

I recommend we (buy, hold, sell—circle one) this stock.

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