

FAVES FROM BINC - MAY 2024

Stock Discussion Group – June 8, 2024

Chicagoland Chapter – BetterInvesting

LET'S TALK STOCKS

The Cast - Ken/Kim/Cy/Mark/Suzi/Pat D.

The Picks

Cy – SYM – Sysco

Kim – PYPL PayPal

Suzi – VRT – Vertiv Holding

Mark – FDS – FactSet Research

Pat – ODD – Oddity Technology

Ken – LULU - Lululemon

Pat – NAPA – The Duckhorn Portfolio

Mark – IRMD - Iradimed

Suzi – ANET– Arista Networks

Kim – CECO – Ceco Environmental

Cy – GNTX - Gentex

Ken – LVMUY – Louis Vuitton

The Lightning Round – Speculation stocks, non-core

Cy – ACMR – ACM Research

Kim – ARDX – Ardelyx

Suzi – ONON – On Holding AG

Mark – PTLO – Portillo's Inc.

Pat – DLO – Dlocal Limited

Ken – LAZR – Luminar

REPAIR SHOP?? – ALL Speculative stocks below

ALNT – Allient Inc

OBDC – BlueOwl Capital

IIPR – (REIT) Innovative Industrial Properties

IXMI – Intermix.io – Private Company

EARLY STAGE INVESTING – Mark R.

CELH – Celiu Holdings

BEST SMALL COMPANIES – Mark R.

MEDP – Medpace Holdings, Inc.

GRBK – Green Brick Partners, Inc.

GLOB – Globant S.A.

EXLS – ExlService Holdings Inc.

TGLS – Tecnoglass Inc.

YETI – YETI Holdings, Inc.

WAL – Western Alliance Bancorporation

NAPCO – Napco Marketing (Private)

TECHNOLOGY TRENDS – Suzi

AI – Everything/Anything AI

deCarta – (private)

NICE Ltd. - NICE

Manhattan Associates, Inc. - MANH

BI GALS TALK STOCK

The Cast – Kim/Mary E./Betsy W.

The Picks

_Kim – ULTA – Ulta Beauty, Inc.

Betsy – POWL – Powell Industries, Inc.

Mary – ISRG – Intuitive Surgery, Inc.

Kim – WH – Wyndham Resorts & Hotels, Inc.

Betsy – PGNV – Progeny, Inc.

Mary – CASH – Pathwood Financial, Inc.

Kim – LULU – Lululemon Athletica Inc.

Betsy – VTSI VirTra, Inc.

CASY – Casey’s General Stores, Inc.

NVO – Noro Nordisk A/S

LLY – Eli Lilly and Company

Betsy - LUNR – Intuitive Machines, Inc.

RKLB – Rocket Lab USA, Inc.

HALO – Halozyme Therapeutics, Inc.

BRKR – Bruker Corporation

ROUNDTABLE

The Cast – Kim/Ken/Cy/Mark/Matt

The Picks

DEO – Diageo plc

Kim – RNR – RenaissanceRe Holdings Ltd.

Cy – CVS – CVS Health Corporation

Matt – LAZR – Luminar Technologies, Inc.

Mark – GNTX - Gentex Corporation

Ken – MNST - Monster Beverage Corporation

TWO GUYS TALK STOCK – Ken and Mark

XPEL – XPEL, Inc.

JEPI – JPMorgan Equity Premium Income ETF

TGLS – Tecnoglass Inc.

IRMD – IRADIMED CORPORATION