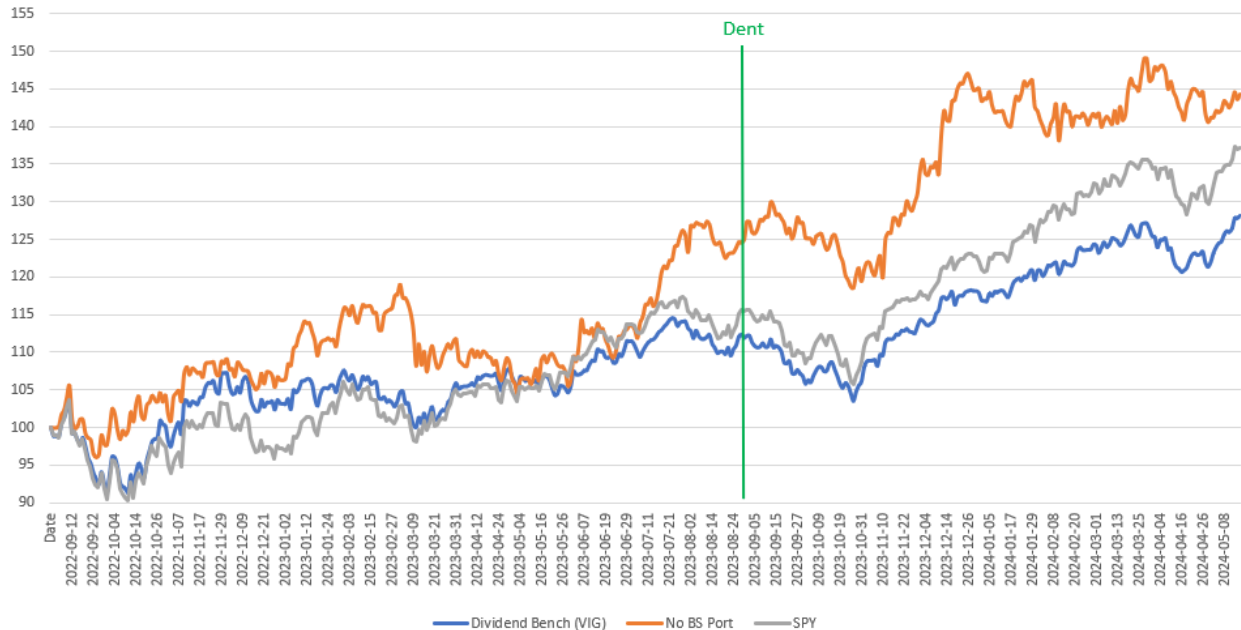


May 27, 2024

The **NO BS** Growth and Income Portfolio

By John Del Vecchio



New Trades this week:

No Trades

Still only 9 positions. The 10th spot remains in cash

Current Portfolio May 27, 2024

Ticker	Name	Return	Days Held	Sector
BURCA	Burnham Holdings, Inc.	1.17%	46	Industrials
CBKM	Consumers Bancorp, Inc.	3.12%	4	Finance
FUSB	First US Bancshares, Inc.	4.75%	53	Finance
MCEM	The Monarch Cement Co.	38.21%	256	Non-Energy Materials
PSX	Phillips 66	51.85%	382	Energy
RSKIA	George Risk Industries, Inc.	2.88%	18	Technology
THFF	First Financial Corp. (Indiana)	11.31%	360	Finance
VLO	Valero Energy Corp.	25.71%	221	Energy
WEYS	Weyco Group, Inc.	21.70%	193	Consumer Cyclical
CASH	CASH	CASH	CASH	CASH



Giving Thanks and Paying Respect

There's no introduction this week.

Today is Memorial Day.

I wanted to express my gratitude to all of those that have served our country.

Furthermore, I wanted to pay my respects to all of those who perished protecting our freedoms.

Not something I talk about...but I pray every day.

Today I will pray that those freedoms stay intact.

There's a lot of bozos in this country who have no idea how good they got it.

I pray they figure that out before it's all taken from them.



The *Risk-O-Meter* is still in the middle of the range.

Market trends are all favorable.

So, you're doing well in your major asset class investments.

For example, your S&P 500 index holdings are going up, up, and up.

However, it would not be surprising if you're feeling some pain in your individual stock holdings.

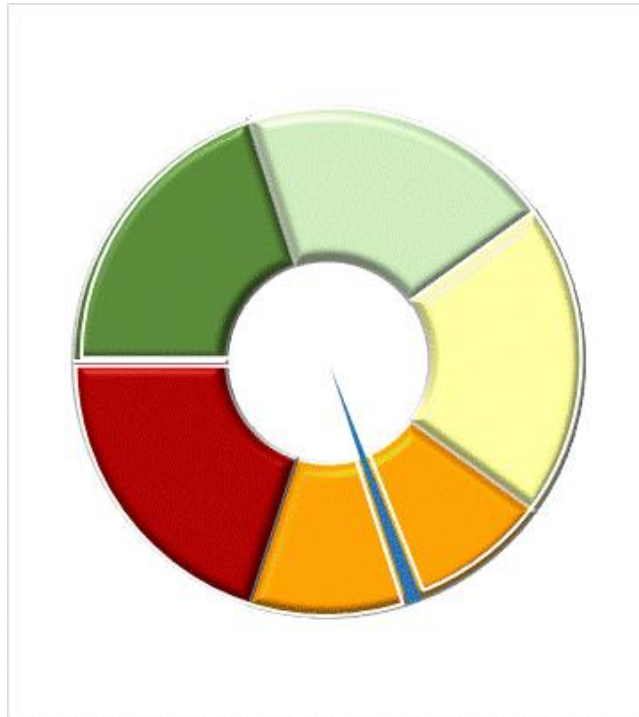
Go take a look.

There's a *definite* layer of weakness underneath the major drivers of the indexes and that's what the *Risk-O-Meter* is highlighting.

That means risks to the downside are greater than we may appreciate by simply watching the major market indexes make new highs.

Many stocks are not making new highs.

It's just something to be aware of at the moment.



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