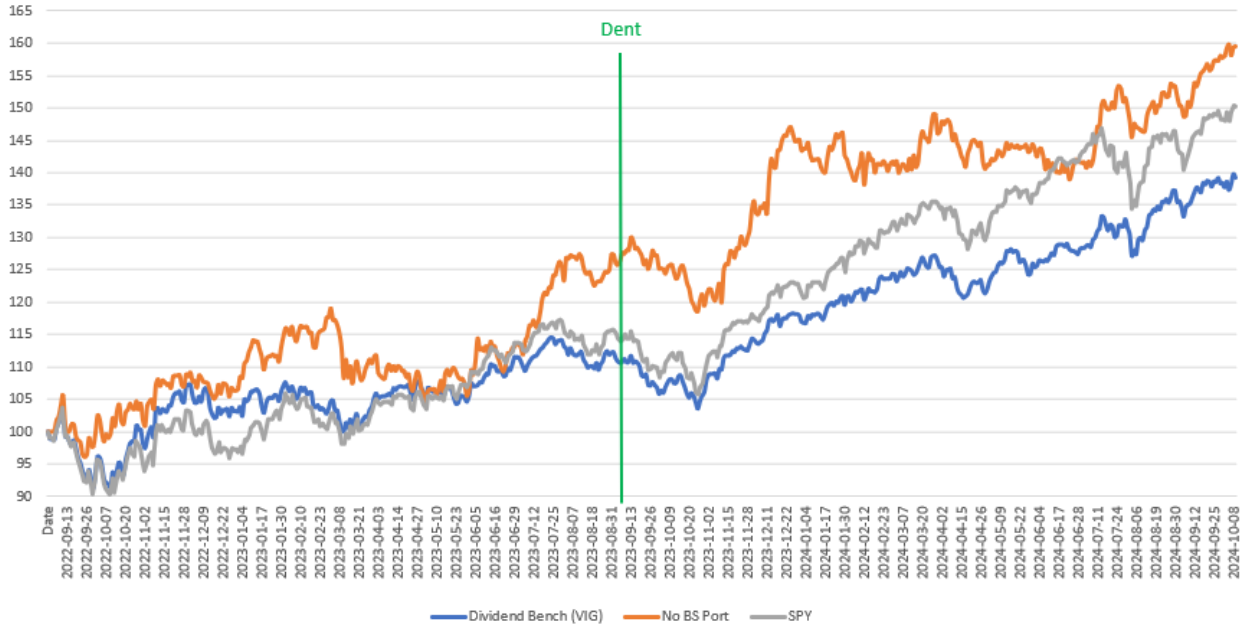


October 14, 2024

# The **NO BS** Growth and Income Portfolio

By John Del Vecchio



## Trades: No trades This Week

Current Portfolio October 14, 2024

Ticker	Name	Return	Days Held	Sector
CBKM	Consumers Bancorp, Inc.	5.77%	143	Finance
CGECF	Cogeco, Inc.	0.96%	66	Telecommunications
EFIN	Eastern Michigan Financial Corp.	11.47%	76	Finance
FMC	FMC Corp.	-2.91%	66	Non-Energy Materials
FUSB	First US Bancshares, Inc.	21.33%	192	Finance
HY	Hyster-Yale, Inc.	9.93%	59	Industrials
MCEM	The Monarch Cement Co.	36.43%	395	Non-Energy Materials
RSKIA	George Risk Industries, Inc.	24.10%	157	Technology
SUN	Sunoco LP	6.20%	59	Energy
VLO	Valero Energy Corp.	6.29%	24	Energy



# Profit from Earnings Season

There's no introduction this week. Next week, on the Thursday email with my insights I am sharing several tips and techniques to profit from earnings season.

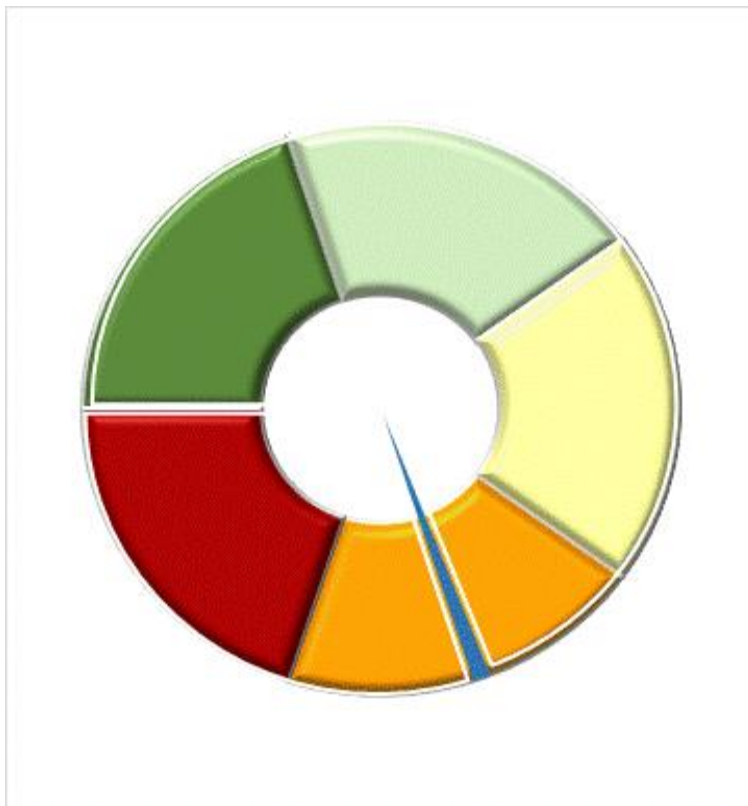
Wall Street's dirty little secret is that they don't do the work to understand what *drives* a company's reported earnings.

I know this firsthand.

The good news is that this lack of effort (or knowledge) provides an edge for investors willing to roll up their sleeves and poke their nose into earnings reports.

One just needs to seize that advantage.

Next week, I will discuss a way to play in emerging markets. I've been investing in emerging markets here and there since the COVID-19 disaster, but I have found the investment choices limited. However, in my research, I stumbled across a fund at the top of my list. I will discuss that in more detail next week.



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