

**Team/Investor Name:** .....

**Your Investment Philosophy (2-3 Sentences):**

*Briefly describe your overall approach. What is your overarching strategy? What key macro-economic or industry trends are you betting on? (Feel free to add anything else)*

**Allocation:**

*How would you split your allocation? Stock 1:  %, Stock 2:  %, Stock 3:  %*

*Explain briefly why:*

**Stock 1 Name:**  **and Ticker:**

**Why:**

**Data to back up claim:**

**Stock 2 Name:**  **and Ticker:**

**Why:**

**Data to back up claim:**

**Stock 3 Name:**  **and Ticker:**

**Why:**

**Data to back up claim:**