



## Ethan LeVeille: Stock Selection Narrative

My portfolio is a mix of energy, retail, automotive, technology, and financial services sectors selected for their performance, market position, and future growth potential. The selection of Exxon Mobil (XOM), Tesla (TSLA), Charles Schwab (SCHW), Macy's (M), and Meta Platforms (META) represents a balanced approach to capitalizing on market trends and established business resilience.

Exxon Mobil (XOM) was chosen for its consistent performance in the energy sector and recent ventures into cleaner energy sources. Its ability to adapt to changing environmental standards and maintain stable dividend growth makes it a cornerstone of my selection. Tesla (TSLA) bets on the future of transportation and energy. Despite its recent volatility in recent years, its cutting-edge technology in electric vehicles and energy storage systems makes TSLA a high-growth prospect. Charles Schwab (SCHW) represents the financial services sector, which is expected to grow steadily as economic conditions normalize in the post-pandemic world. SCHW's robust online platform has demonstrated significant customer growth, benefiting from the retail trading boom. Macy's (M) is an established retail giant undergoing a digital shift/expansion to the online marketplace. The inclusion is a value play, betting on its recovery fueled by e-commerce growth and a return to in-store shopping experiences. Lastly, Meta Platforms (META) is included in its expansive digital ecosystem, including social media and its investment in virtual reality. META is in a position for growth as advertising revenues stabilize and new platforms gain traction.

The selected stocks are diversified across different industries to mitigate systemic risks and capitalize on individual sector growth. The daily growth of a \$10,000 investment across these stocks since 2014 showcases the potential for significant returns and the importance of diversification. The Compound Annual Growth Rate (CAGR) for each stock across different periods further informs our investment strategy, allowing us to understand and anticipate long-term trends versus short-term fluctuations.

In conclusion, this carefully curated selection reflects a strategic approach to balance steady income, growth potential, and market resilience.