



Subscribed



3	Long South Africa/Short Turkey	+60.80%	20	Blue Economy	+9.71%
4	Cable TV	+51.54%	21	Homebuilder Shorts	+8.80%
5	Long LatAm vs. Argentina	+40.64%	22	Phoenix	+8.37%
6	EV Lightweighting	+33.01%	23	Shrinkage Solutions	+5.60%
7	Capacitors	+32.79%	24	Travel	+4.90%
8	Digitization of Loss Prevention	+32.74%	25	Long DAX Short MDAX	+3.74%
9	Crouching Tigers, Hidden Dragons	+30.26%	26	Shrinkage Digital Solutions	+3.05%
10	Passive Components	+27.85%	27	Furniture	+1.70%
11	Single Stock Picks	+26.50%	28	Permitting	+0.66%
12	Rare Diseases	+25.64%	29	Long XLV Short XLF	-1.58%
13	Fast Finance	+21.44%	30	Long YETI Short SharkNinja	-7.15%
14	Special Sits	+21.39%	31	Long Deregulation/Short IRA	-9.87%
15	Long STOXX 50 Short IWM	+20.43%	32	Ag Drones	-15.96%
16	Pet Care Reset	+18.55%	33	Food Quality	-20.37%
17	Mobile Power Generation	+16.93%	34	Remittances	-23.34%

We had similar dispersion in our single stock picks - some big winners

(Allient doubled on Rockwell returning to growth and robotics

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