**STOCK REPORT FORM**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Stock Report For: | |  | | | | | | |
| CAP: |  | | Reporter: |  | BUY Range: |  | SELL Range: |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **YEAR** | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC |
| Date of Report |  |  |  |  |  |  |  |  |  |  |  |  |
| Present Price |  |  |  |  |  |  |  |  |  |  |  |  |
| 52 Week High |  |  |  |  |  |  |  |  |  |  |  |  |
| 52 Week Low |  |  |  |  |  |  |  |  |  |  |  |  |
| **REFER TO SSG** |  |  |  |  |  |  |  |  |  |  |  |  |
| DEBT (% Total Cap) |  |  |  |  |  |  |  |  |  |  |  |  |
| 5 Yr Avg P/E |  |  |  |  |  |  |  |  |  |  |  |  |
| Present P/E |  |  |  |  |  |  |  |  |  |  |  |  |
| BUY/HOLD/SELL |  |  |  |  |  |  |  |  |  |  |  |  |
| Upside/Downside Ratio |  |  |  |  |  |  |  |  |  |  |  |  |
| Relative Value |  |  |  |  |  |  |  |  |  |  |  |  |
| Annual Rate of Return |  |  |  |  |  |  |  |  |  |  |  |  |
| **REFER TO VL** |  |  |  |  |  |  |  |  |  |  |  |  |
| Dividend |  |  |  |  |  |  |  |  |  |  |  |  |
| Timeliness |  |  |  |  |  |  |  |  |  |  |  |  |
| Safety |  |  |  |  |  |  |  |  |  |  |  |  |
| Technical |  |  |  |  |  |  |  |  |  |  |  |  |
| Financial Strength |  |  |  |  |  |  |  |  |  |  |  |  |
| Date of VL |  |  |  |  |  |  |  |  |  |  |  |  |

**Stock Analysis**

|  |  |  |  |
| --- | --- | --- | --- |
| BUY/HOLD/SELL: |  | My Recommendation: |  |
| Current Price: |  |  |  |
| Change In Price?: |  | Price Trend?: |  |
|  | (*current price – previous price) ÷ previous price x 100 =* |  |  |
| Earnings Report |  |  |  |
| ValueLine: |  |  |  |
| % of Portfolio: |  |  |  |

**News:**