

THE WORKING PROFIT INVESTMENT LETTER

... Expectations

OUR APPROACH

We treat you the way we want to be treated: no selling your information, no inbox clutter, no sponsored content. Just straightforward analysis aimed at growing your net worth. I own everything I recommend and in size.

WPIL All Cap & Activist Portfolio (ACA)

- 1–2 new ideas per month, each with a full thesis and analysis
- Trades are communicated BEFORE we trade for ourselves...that's only fair

We target undervalued equities and utilize highly rated equity analysts across the industry. Also, the country's largest, most successful activist investors...we want catalysts to accelerate our exposures. And of course, 50 years of experience in independent research and money management. We've seen it all.

WPIL Biotech Pharma

High-risk, high-volatility by nature

We are guided by research from the best biotech analysts in the industry

- Price targets are a minimum of 200%+ above current levels
- Driven by near-term catalysts — clinical trial results, FDA decisions, conferences

A bench portfolio of potential home runs...typically holding 20–25 position. Money management is crucial to float exposures eventually to the small number that will carry home the performance. Which then becomes...

Concentrated Biotech Focus List

Our most popular offering: focused positions, typically 5–10 names — companies already showing real, demonstrated progress. Subscribers can follow only these higher-conviction picks if preferred. I personally invest in 25 names and in meaningful size.

Preferred Stock Portfolio

High yield with the potential for equity-like capital gains. Focused on interest rate movement.

ONGOING COMMUNICATION

Weekly Stock News Summaries

Sent over the weekend, exhaustive news coverage on our positions with my take where relevant

Periodic Market Commentary

We tend to publish most days...general market commentary, thing we've noticed, updates.

Everything comes back to one goal: Standing alongside our subscribers to seek to grow our collective net worth after-inflation, after-taxes and after expenses. Win or lose together.