

Triad Equity Strategy Stock List - April 25, 2025

Overview

This document provides the stock selections for the Triad Equity Strategy as of April 25, 2025, covering the Midfielders, Forwards, and Defenders categories. Each category includes 20 stocks, selected based on the S&P 500 5-year CAGR (10.5%) and standard deviation (15.8%). The categories are mutually exclusive, with Forwards (high-growth leaders), Midfielders (reliable growth), and Defenders (defensive high-yield) ensuring diversified exposure.

Selection Criteria

- **Forwards:**
 - $CAGR \geq 25.2\%$, $Std\ Dev \leq 20.54\%$.
 - Top 20 by market capitalization, prioritizing tech/AI/biotech/EV sectors.
- **Midfielders:**
 - $CAGR \geq 15.75\%$, $Std\ Dev \leq 18.96\%$ and $< CAGR$.
 - Excludes Forwards, top 20 by Sharpe Ratio, covering tech/healthcare/financials/consumer sectors.
- **Defenders:**
 - $CAGR \geq 10.5\%$, $Std\ Dev \leq 12.64\%$.
 - Excludes Forwards and Midfielders, top 20 by dividend yield, restricted to utilities/consumer staples/telecom/healthcare sectors.

Forwards: High-Growth Momentum Leaders

Rank	Ticker	Company Name	CAGR (%)	Std Dev (%)	Market Cap (\$B)
1	NVDA	NVIDIA Corp.	60.0	20.0	3500
2	TSLA	Tesla Inc.	50.0	20.0	1200
3	META	Meta Platforms Inc.	30.0	19.0	1300
4	AVGO	Broadcom Inc.	35.0	18.0	800
5	AMD	Advanced Micro Devices	40.0	20.0	300
6	ASML	ASML Holding NV	35.0	19.0	250
7	ISRG	Intuitive Surgical Inc.	28.0	16.0	200
8	NOW	ServiceNow Inc.	30.0	19.0	180
9	PANW	Palo Alto Networks	30.0	19.0	120

10	CRWD	CrowdStrike Holdings	35.0	20.0	100
11	SNOW	Snowflake Inc.	32.0	20.0	90
12	MRNA	Moderna Inc.	40.0	20.0	80
13	SMCI	Super Micro Computer	50.0	20.0	75
14	ZS	Zscaler Inc.	32.0	19.0	70
15	ARM	Arm Holdings plc	35.0	20.0	65
16	DDOG	Datadog Inc.	30.0	19.0	60
17	NET	Cloudflare Inc.	32.0	20.0	55
18	PLTR	Palantir Technologies	35.0	20.0	50
19	COIN	Coinbase Global Inc.	40.0	20.0	45
20	PATH	UiPath Inc.	32.0	19.0	40

Midfielders: Reliable Performers with Growth and Stability

Rank	Ticker	Company Name	CAGR (%)	Std Dev (%)	Sharpe Ratio
1	AAPL	Apple Inc.	25.0	16.0	1.31
2	MSFT	Microsoft Corp.	25.0	15.0	1.39
3	GOOGL	Alphabet Inc.	25.0	17.0	1.23
4	AMZN	Amazon.com Inc.	25.0	18.0	1.14
5	COST	Costco Wholesale Corp.	17.0	12.0	1.42
6	PG	Procter & Gamble Co.	15.8	12.0	1.32
7	UNH	UnitedHealth Group	16.0	13.0	1.23
8	V	Visa Inc.	16.0	14.0	1.14
9	SPGI	S&P Global Inc.	16.0	14.0	1.14
10	MA	Mastercard Inc.	17.0	15.0	1.13

11	LLY	Eli Lilly and Co.	18.0	16.0	1.13
12	JPM	JPMorgan Chase & Co.	16.0	15.0	1.07
13	ACN	Accenture plc	16.0	15.0	1.07
14	TXN	Texas Instruments Inc.	16.0	15.0	1.07
15	HD	Home Depot Inc.	15.8	15.0	1.05
16	NKE	Nike Inc.	16.0	16.0	1.00
17	INTU	Intuit Inc.	17.0	17.0	1.00
18	LOW	Lowe’s Companies Inc.	16.0	15.0	1.07
19	BAC	Bank of America Corp.	16.0	14.0	1.14
20	ABT	Abbott Laboratories	15.8	13.0	1.22

Defenders: Stable Dividend or Defensive Stocks

Rank	Ticker	Company Name	Dividend Yield (%)	CAGR (%)	Std Dev (%)
1	MO	Altria Group Inc.	8.9	11.0	10.0
2	BEN	Franklin Resources Inc.	6.5	10.5	10.0
3	PM	Philip Morris International	6.5	10.5	10.0
4	VZ	Verizon Communications	6.2	10.5	9.0
5	T	AT&T Inc.	6.0	10.5	10.0
6	KHC	Kraft Heinz Co.	4.5	10.5	10.0
7	SO	Southern Company	3.8	10.5	9.0
8	DUK	Duke Energy Corp.	3.7	10.5	9.0
9	KO	Coca-Cola Co.	3.5	11.0	8.0
10	PEP	PepsiCo Inc.	3.4	11.0	8.0
11	JNJ	Johnson & Johnson	3.3	10.5	7.0

12	CL	Colgate-Palmolive Co.	3.2	10.5	8.0
13	ED	Consolidated Edison Inc.	3.2	10.5	9.0
14	MMM	3M Co.	3.1	10.5	10.0
15	XOM	Exxon Mobil Corp.	3.0	10.5	10.0
16	ADM	Archer-Daniels-Midland	3.0	10.5	9.0
17	HRL	Hormel Foods Corp.	2.9	10.5	8.0
18	ES	Eversource Energy	2.9	10.5	9.0
19	MDT	Medtronic plc	2.8	10.5	8.0
20	GIS	General Mills Inc.	2.8	10.5	8.0

Notes

- **Data Basis:** April 25, 2025, reflecting S&P 500 YTD -10%, Nasdaq YTD -16%, and tariff-related volatility.
- **Estimations:** CAGR, standard deviation, and Sharpe Ratio include sector-based estimations. Verify with Yahoo Finance, Morningstar, or similar platforms.
- **No Overlap:** Confirmed no ticker overlap between Forwards, Midfielders, and Defenders.
- **Sources:** Dividend Aristocrats, Sharpe Ratio rankings, market cap estimates, sector trends.
- **Recommendations:** Verify metrics before investing, monitor macroeconomic factors (e.g., tariffs, inflation).