David and tom gardner stock picks 2020

April 23, 2016 Order Reprints Press Article Photo: Axel Dupeux for Barron's it seems absurd to call Ron Baron a money manager when he is much more-CEO, raconteur, impresario. His Baron Investment Conference for Shareholders last year took over all of Lincoln Center and headline entertainers Alicia Keys, Tony Bennett, and Lady Gaga, personally picked by him, as well as a number of CEOs who run companies owned by his funds. Baron, 72, runs Baron Capital, a growth investment business with $23 billion in 13 funds overseen by 10 managers. He personally invested more than $500 million in funds. He also manages the company's flagship fund, Baron Growth (ticker: BGRFX), which has trounced its rivals... An error occurred, try again later. Thank you This article was posted there is a website for stock screening that uses Benjamin Graham's value-investing rules? Benjamin Graham, the father of securities analysis, outlined his stock selection strategies in The Intelligent Investor, published in 1949, and since then these strategies have been widely disseminated – even online. Graham defended buying the shares at a price that is significantly lower than the company's intrinsic value. His goal was to acquire a dollar of assets for less than 50 cents. This discount provides investors with a security reserve that insulates them from the vagaries of the market. A lot of websites have screens based on Graham's methods. For example, he valued companies with net cash holdings (cash minus outstanding debt) at at least 50% of their stock market value. The Nasdaq website offers a free Graham screener that selects Nasdaq-traded stocks that pass the test. Morningstar.com a customized screen that uses a wider range of Graham criteria. The screen is part of morningstar's premium membership, which costs $15.95 per month, or $145 for one year. Or, for less than $20, buy Smart Investor and create your own Graham-inspired screens at Kiplinger.com or Yahoo Finance.A word of caution: Graham's criteria can lead you to stocks that are value traps, meaning stocks are cheap for good reason and unlikely to be appreciated. Screens are a good place to start, but don't buy without doing your research. Skip to headerSkip to main contentSkip on footerMMy annual stock options beat the Standard & Poor's 500 stock index for the fourth year in a row in 2019 and the margin was pretty spectacular if I say so myself. For the 12 months ended October 31, 2019, my tips returned an average of 30.0% compared to 14.3% for the S&; P. But as I reminded readers last year, don't get too excited about my forecasting skills. No one beats the market consistently. Since 1993, I have selected nine selections from experts and added my own selection. The big winner of 2019, which returned by 112.1%, was coupa software (coup symbol), which combines It was the election of Terry Tillman, an analyst with a golden touch at SunTrust Robinson Humphrey. His picks on my list beat the S&P eight years in a row. Among his recent recommendations, I like Okta (OKTA, whose software verifies and manages the identity of people seeking online access to the company's website-valuable corporate defense against hacking. Okta went public in 2017 and now has a market value of $13 billion. The company still hasn't made a profit, but revenue surges. Another successful regular on the list is Jerome Dodson, founder of Parnassus Endeavor (PARWX), my favorite fund in the socially responsible investment category. Dodson's pick for 2019 was Starbucks (SBUX), up 47.6%. A year ago, Dodson took advantage of a big price drop and began acquiring shares of Nvidia (NVDA), a giant processor maker for applications that include computer games and artificial intelligence. In fact, Nvidia may be the best AI game. The stock has rebounded more than 50% from its June low, but still offers excellent value. Despite China's customs disputes with the US, I remain a supporter of Chinese stocks - especially those not dependent on the sale of industrial goods abroad, such as the Trip.com Group (CTRP), a company formerly known as Ctrip.com International, which is called Expedia of China. It serves a nation that's crazy about traveling. Stocks are trading well below 2017 highs, with the price-to-earnings ratio, based on estimated earnings for 2020, being 21 – below the historically high P/E level. Trip.com is one of the top 25 holdings of my favorite Asian equity mutual fund, Matthews China (MCHFX). Daniel Abramowitz, of Hillson Financial Management, in Rockville, Md., is my go-to guy for small-cap stock values. For the following year he likes The Chemours Co. (CC), a chemical manufacturer that DuPont spins off in 2015. The main products include titanium dioxide, which adds brightness and hardness to enamelled porcelain, and Opteon, a refrigerant with environmental advantages over Freon. Chemours soared in price in the first few years after the spin-off, then ran into operational problems that Abramowitz believes are temporary. Chemours, he says, is a well-run, shareholder-friendly business, and the stock is disproportionately depressed after a sharp sell-off. It's definitely cheap. P/E is only 5.Last year I highlighted Artisan Thematic Investor (ARTTX), barely a year old, as a mutual fund worth watching. My portfolio pick, IHS Markit (INFO), returned a wonderful 33.3%. Linde (LIN), a major supplier of industrial gases including nitrogen and oxygen, is a recent acquisition and the fund's seventh largest portfolio stake. The company was formed in 2018 by the merger of the German company Linde AG and the AMERICAN giant Praxair. Since then, it has played exceptionally-with more to come. Value line investment survey an invaluable resource that wraps tons of information in a small space. Last year's highly rated pick from Value Line was Home Depot (HD), which returned 36.3%. For 2020, I looked at the 20-stock value line portfolio model for aggressive investors and found one share with the highest rating for both timeliness and safety. This population is Medtronic (MDT), which makes pacemakers and other medical devices. Medtronic's earnings have increased year-on-year for more than a decade in what I call a beautiful line. This stock is as solid as it gets. Whatever your religion, pay attention to a mutual fund called Ave Maria Growth (AVEGX), which according to its website is part of the largest Catholic family of mutual funds in the US and places the same emphasis on investment performance and moral criteria when choosing securities. Whatever Ave Maria's doing, it's working. The fund has returned an annual average of 12.7% over the past five years, compared with 10.8% for the S&; P 500. The largest holding, since September 30, was Copart (CPRT), which operates online vehicle auctions, mainly selling damaged cars on behalf of insurance companies. It's a great shop; Value Line projects earnings will grow at an annual average of 17.5% for the next five years. The stock has more than quadrupled in three years, but even with p/e 32, based on estimated earnings for the next four quarters, it doesn't seem overpriced to me. My usual modus operandi is to let last year's big winners be this year's pickers, but for 2020, I'm giving Warren Buffett, chairman of Berkshire Hathaway (BRK-B), a second chance. His choice for 2019 was U.S. Bancorp (USB), which returned an average of 12.0%. Buffett has been adding to his USB holdings and now owns 8% of America's fifth-largest bank (more than any other shareholder), so I'm putting it here as a 2020 pick, too. Profits have been steadily rising for widely diversified banks, and the stock is yielding nearly 3%, or roughly double the yield on the five-year Treasury Note.T. Rowe Price of New Horizons (PRNHX), one of the original small-cap and (now mostly) mid-cap growth funds, celebrating its 60th anniversary. In nine of the past 10 years (including 2019 through October 31), the Russell Midcap Growth index, Morningstar's benchmark for the fund, has beaten. The fund is currently closed to new investors and a new manager arrived last March, but you can look at the portfolio for investing ideas. The highest holding since September 30 has been, appropriately, Bright Horizons Family Solutions (BFAM), which operates childcare and early education centers, as well as providing college-entrance counseling services. It's an impressive business, and although stocks aren't cheap, it's down from its highs last summer. My personal pick for 2019 was The New York Times Co. (NYT), which returned 17.8%. I still like it. But By 2020, I have decided to look for bargains by opting out of market strategist Ed Yardeni's regular industry review. The worst category for 2019 was energy, especially oil and gas drillers such as Diamond Offshore Drilling (DO), which traded above $25 a share in 2016. But Diamond's majority shareholder is Loew (L), who is on a cash plane and runs the savvy Tisch family. I am willing to wait for the inevitable recovery in energy prices. With stocks trading at these prices, Diamond looks like a very good bet. Here are my usual warnings: These 10 stocks vary in size and industry, but are not intended for a diversified portfolio. I expect it to beat the market next year, but I don't recommend holding stocks for less than five years, so consider these long-term investments. And most of all: I'm just offering suggestions here. The election is yours. 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