

# Performance summary

Legendary Investors

Ken Fisher and Ken Griffin

Anil Kumar, CFA, CAIA, CIPM

Tiwi Investment & Consultancy, Muscat, Oman

GSM: (+968) 9010 1438 / 9133 9784

Email: [anil.neerukonda@tiwiinvestment.com](mailto:anil.neerukonda@tiwiinvestment.com)

Stock	From the Portfolio of	Recommended on	Entry price, \$	Price on Aug 07, 2023 (\$)	% change	Updates
Adobe	Fisher	Feb 27, 2023	321	530	65%	Momentum in sales growth across all its business segments. Free cash flow is also growing steadily
AMD	Fisher	Feb 27, 2023	89	117	31%	AMD is now #2 supplier in data center GPU offering after NVIDIA. Both margin and FCF outlook look healthy
Uber	Griffin	Apr 10, 2023	31	45	45%	Favorable industry dynamics in both mobility and delivery segments followed by product innovation are helping the company to gain market share and become profitable
M&T Bank	Griffin	Apr 10, 2023	118	142	20%	M&T Bank has managed the regional bank crisis extremely well as it didn't have large unrealized losses in its securities portfolio unlike many of its peers

Report links: [https://www.linkedin.com/posts/anil-neerukonda-cfa-caia-cipm-006a643\\_legends-ken-fisher-activity-7036217941071179776-bKzr?utm\\_source=share&utm\\_medium=member\\_desktop](https://www.linkedin.com/posts/anil-neerukonda-cfa-caia-cipm-006a643_legends-ken-fisher-activity-7036217941071179776-bKzr?utm_source=share&utm_medium=member_desktop) (Ken Fisher's Picks, Feb 27, 2023)

[https://www.linkedin.com/posts/anil-neerukonda-cfa-caia-cipm-006a643\\_ken-griffins-picks-apr-2023-activity-7051812226675924992-XkFz?utm\\_source=share&utm\\_medium=member\\_desktop](https://www.linkedin.com/posts/anil-neerukonda-cfa-caia-cipm-006a643_ken-griffins-picks-apr-2023-activity-7051812226675924992-XkFz?utm_source=share&utm_medium=member_desktop) (Ken Griffin's Picks, Apr 10, 2023)