



BLUCHIP DIVIDEND STRATEGY

The BluChip Dividend Strategy seeks to invest in companies with rising dividends. Typically, the companies are high dividend yielding, relative to other blue chip companies. The better yield characteristics are due to the stock being out-of-favor and therefore cheap on a relative basis. These shares are typically a very good long term value.

As the dividends of these stocks rise, the price often follows. In our research, we study the guidance from the company as to how much they intend to increase the dividend. Historically, investors can rely on the guidance given by company management relating to the intended growth of dividends. This is because corporate managers know that if a company fails to grow the dividend as much as expected the stock price would likely suffer. Corporate management has a vested interest in a strong stock price. So, the management of the company normally only promises the dividend increases that they can truly deliver. That's very useful in improving the likelihood of investment success.

Both fundamental and technical research are employed. We rotate out of lower ranked dividend yielding stocks and into more highly ranked dividend yielding stocks over time. The portfolio is equally weighted to reduce risk and rebalance as needed.

BLUCHIP DIVIDEND STRATEGY GOALS:



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