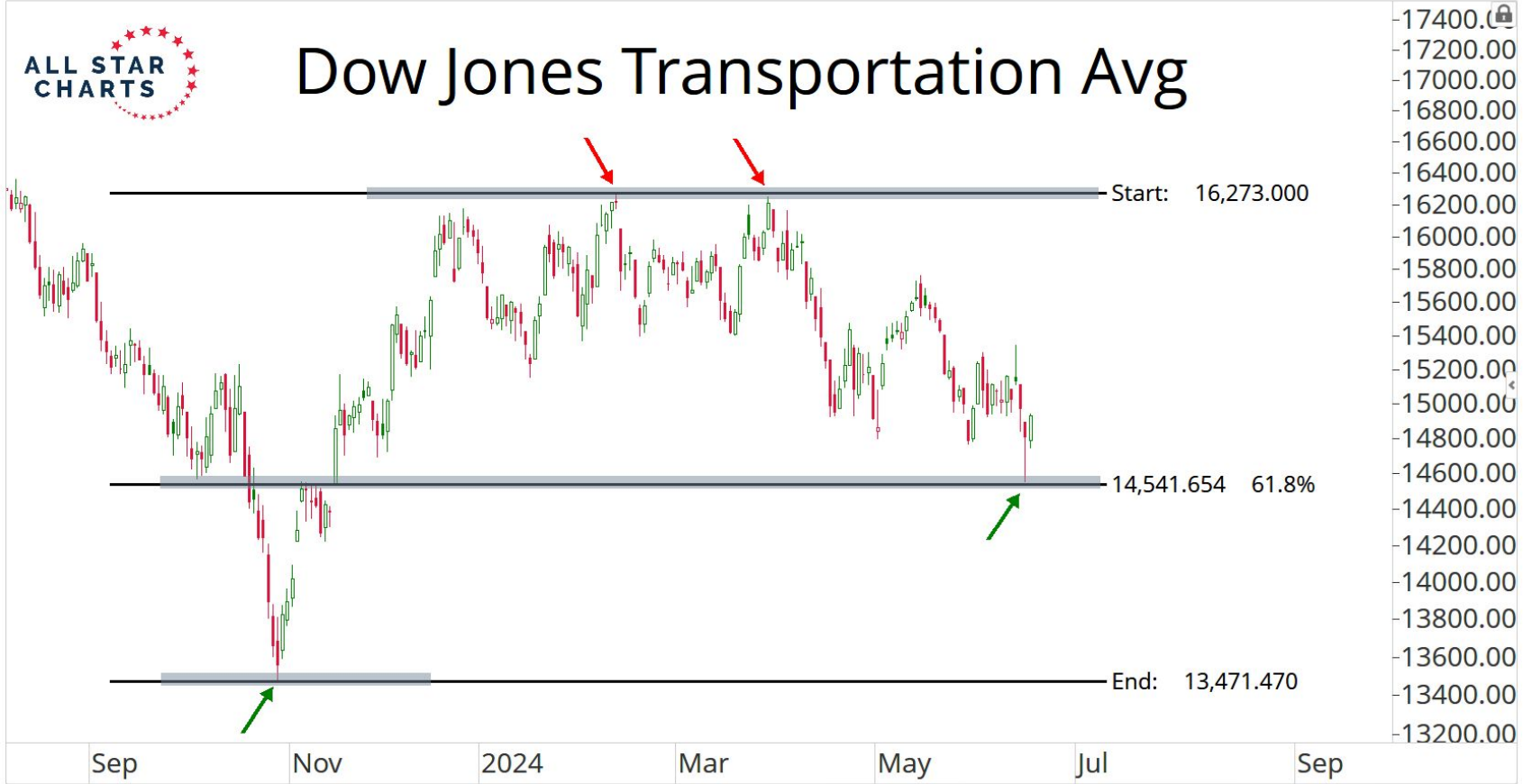


The Morning Show Slide Deck

June 18, 2024



Dow Jones Transportation Avg



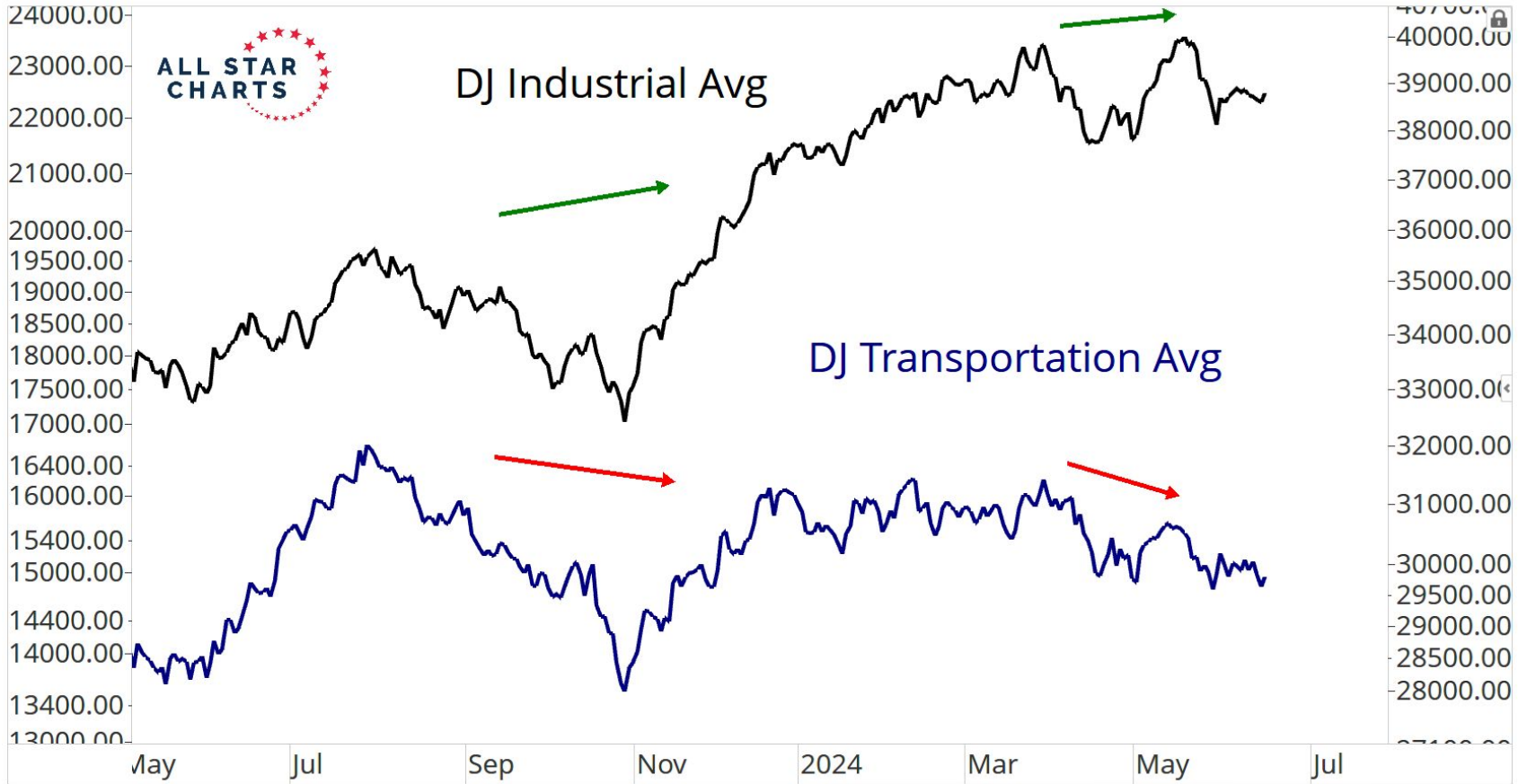


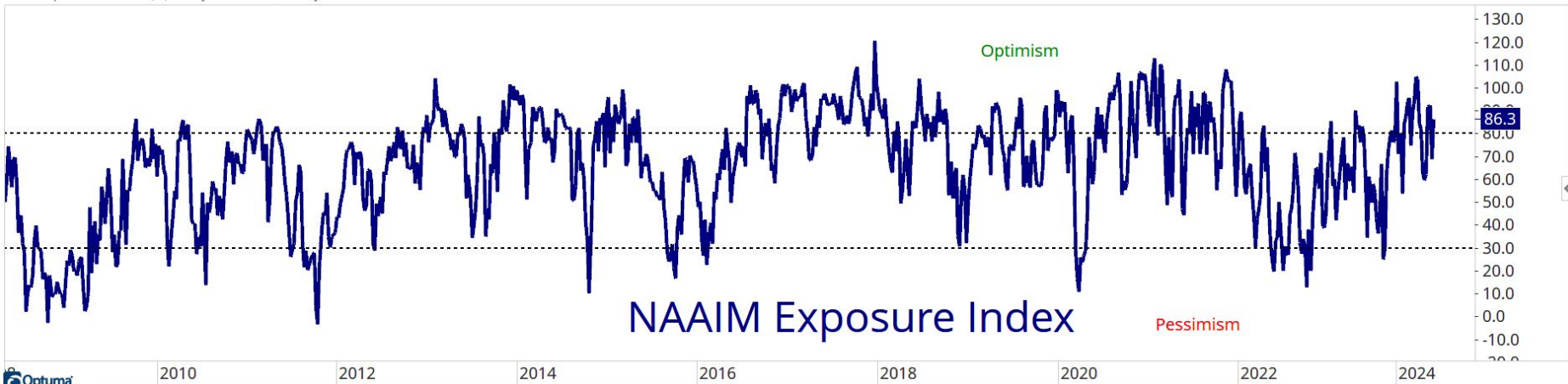


Figure 2: Are you more likely to increase or decrease equity exposure over the coming days/weeks?



Source: J.P. Morgan.

S&P 500





Technology Sector \$XLK

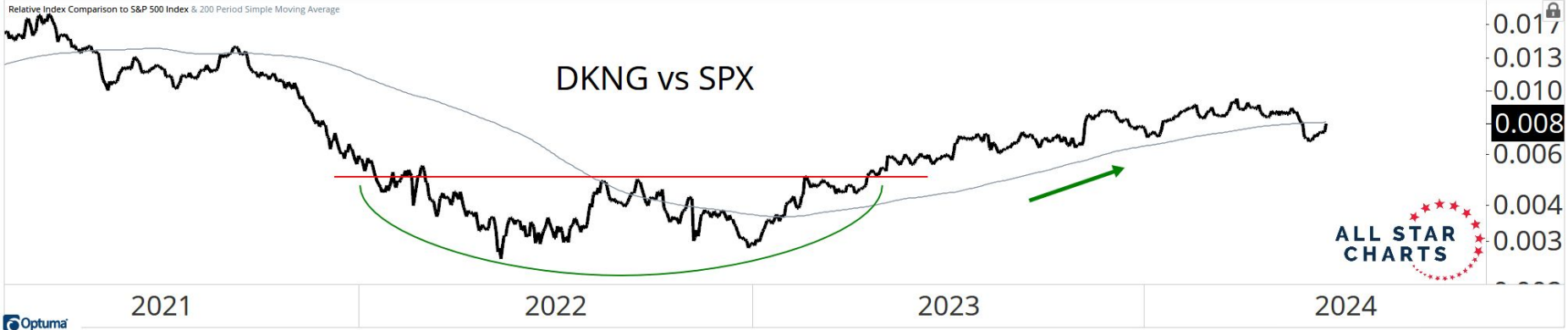


18th Jun 2024



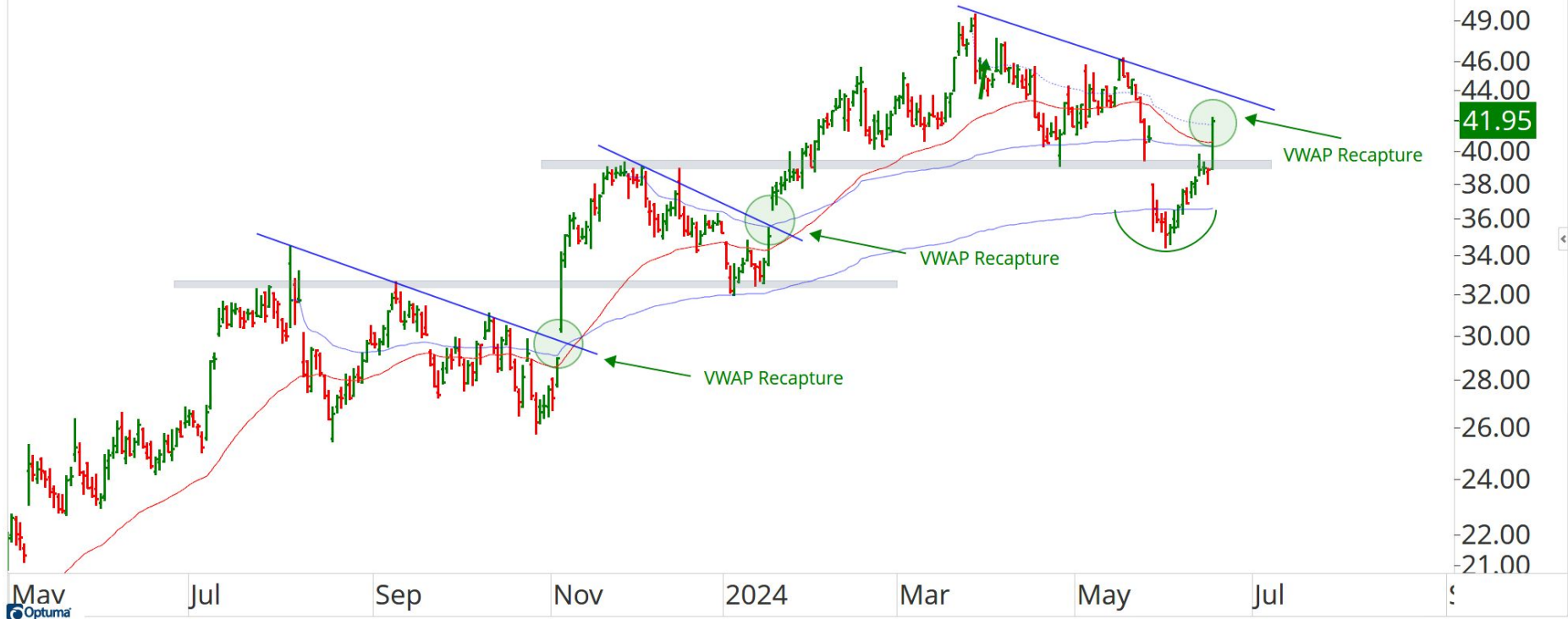
Lennar Corp \$LEN

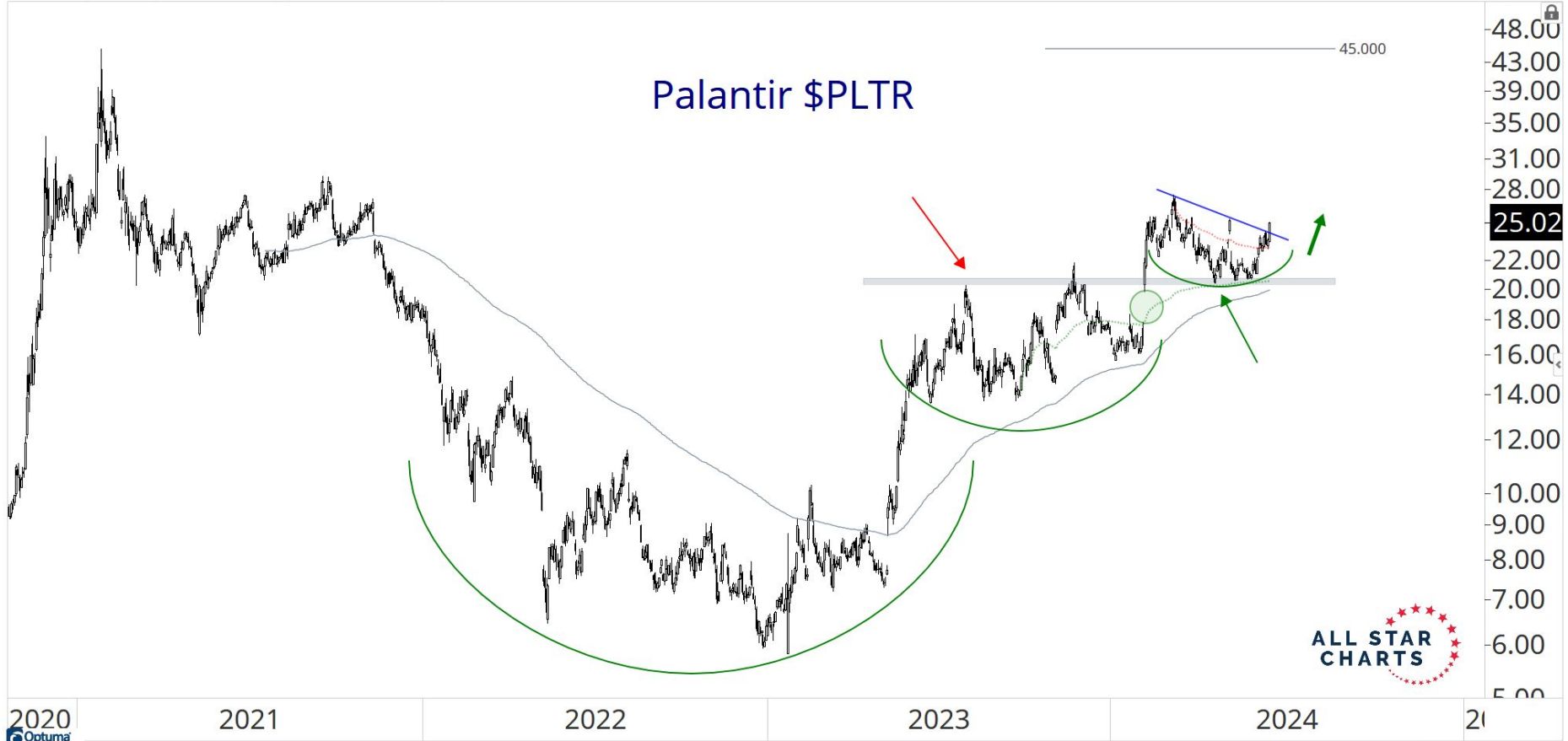






Draftkings \$DKNG





Shopify \$SHOP



Relative Index Comparison to S&P 500 Index & 200 Period Simple Moving Average

SHOP vs SPX



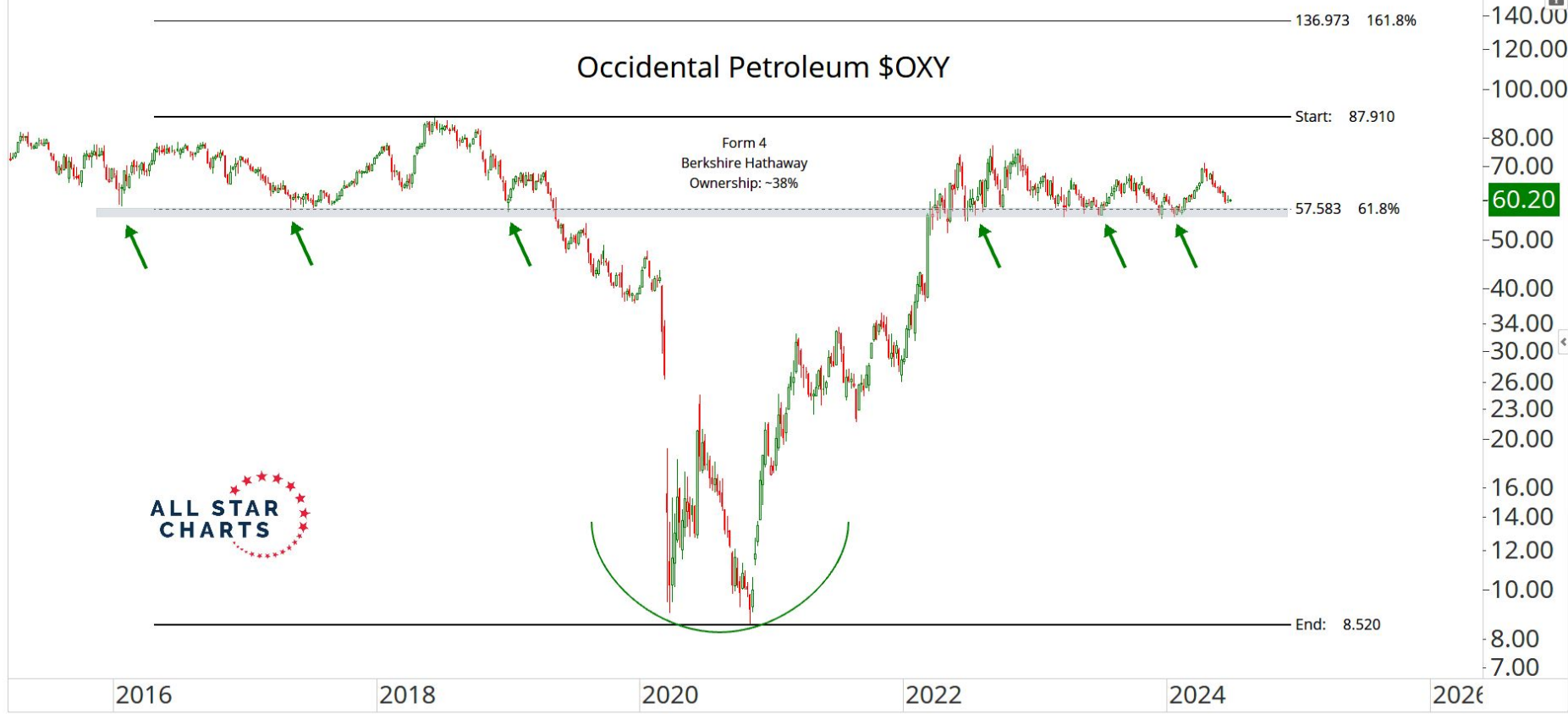
THE HOT CORNER

Date	Ticker	Company Name	Industry	Reporting Person/ Investor	Form	Comment
6/17/2024	OXY	Occidental Petroleum Corporation	Oil & Gas E&P	BUFFETT WARREN E	Form 4	Amount: \$175,976,798
6/17/2024	NRDY	Nerdy, Inc.	Software - Application	CHIEF EXECUTIVE OFFICER	Form 4	Amount: \$652,877
6/17/2024	LMND	Lemonade, Inc.	Insurance - Property & Casualty	CHIEF FINANCIAL OFFICER	Form 4	Amount: \$304,650
6/17/2024	ITW	Illinois Tool Works Inc.	Specialty Industrial Machinery	SMITH DAVID BYRON JR	Form 4	Amount: \$185,085
6/17/2024	EVH	Evolent Health, Inc.	Health Information Services	RA CAPITAL MANAGEMENT	13G	Original Filing: 7.10%

Data As Of June 17, 2024

ALL STAR CHARTS

Occidental Petroleum \$OXY



17th Jun 2024



Guest Segment

Greg Harmon, Founder & President, Dragonfly Capital

