

Roadmap2Retire

A financial independence journey fueled by passive income

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Simply Investing Review



I recently came across Simply Investing and realized that it was run by a blogger here in Ottawa, Canada. Not only that, we both work in the same industry and our offices are within a couple of kilometers from each other. Needless to say, we had to meet up for lunch and chat all things investing and blogging. This was my first time meeting another blogger in real life, and I have to admit that it was very refreshing and a

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fun lunch to chat about our common interests.

Kanwal, founder of Simply Investing, has been investing, blogging, and teaching for years now and he asked me to review his Simply Investing Monthly Report and offer it to my readers as a sweepstake. As a special, one Roadmap2Retire reader will get free subscription for 12 months (of value \$240) and other Roadmap2Retire readers will get a 15% discount. What does the Simply Investing Report offer? Read on.

Simply Investing Report

Simply Investing Report is Kanwal's way of presenting dividend growth companies that can be potential investment targets based on 12 Rules. These rules include qualitative aspects such as whether a company is recession-proof, has a competitive advantage in the sector etc as well some quantitative rules such as debt ratio, P/E ratios etc (see the full list of rules in the image below). Based on these rules, the US and Canadian companies are presented each month that are undervalued and overvalued. The universe of stocks selected comprise of 60 US dividend stocks and 50 Canadian dividend stocks. In addition, Top-Five picks are presented at the beginning of the report for US and Canadian markets. This provides a quick overview and a short thesis on why a particular stock made it to the list. It is also interesting to note that each report also contains overvalued stocks — which can provide some perspective on which companies to avoid. The data in Simply Investing Report is published in

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PDF form for easy reading, but for the DIY investor, an excel sheet is also provided, so that investors can sort data according various metrics presented.

Each month the Simply Invest Report provides data on the following 25 metrics for each of the stocks in the Report:

1. EPS Growth
2. Dividend Growth
3. Payout Ratio
4. Long-term Debt/Equity Ratio
5. S&P Credit Rating
6. Share Buyback
7. P/E Ratio
8. Current Dividend Yield
9. 11-year Average Dividend Yield
10. 11-year Average High Dividend Yield
11. 11-year Average Low Dividend Yield
12. High Stock Price
13. Low Stock Price
14. P/B Ratio
15. Book Value per Share
16. SI Criteria
17. Share Price
18. Annual Dividend
19. Graham Price
20. % Difference Graham Price vs Current Price
21. Consecutive Dividend Increases
22. Dividends Paid Since
23. Industry
24. Undervalued/Overvalued

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25. EPS

I invite you to check out a sample of the Simply Investing Report for September 2016. The files can be found here: [PDF version](#) & [Excel Sheet](#).

Simply Investing

provides subscribers to a quick list to sort through and provides not only undervalued, but also overvalued stocks in the market. As regular readers may be aware that I am of the opinion that it is prudent for investors to keep an eye on both ends of the spectrum and if the valuation appears to be skewed to one end, selling is not a terrible idea. This goes contrary to some other investors out there as the philosophy seems to be to Buy-Only and Never-Sell. Simply Investing Monthly Report can help subscribers get a perspective on which stocks fall on that spectrum to take an informed decision.

Sweepstakes

1. Do you understand the product or service offered by the company?
2. Will people still be using this product or service in 20 years?
3. Does the company have a low-cost durable (lasting) competitive advantage?
4. Is the company recession proof?
5. Has the company had consistent earnings growth?
Generally the EPS growth must be at least 8%
6. Has the company had consistent dividend growth?
Generally the dividend growth must be at least 8%
7. Does the company have a low payout ratio?
Payout ratio must be 75% or less.
8. Does the company have low debt?
Debt must be 70% or less.
9. Does the company have a good credit rating?
Company must have a minimum S&P Credit Rating of "BBB+".
10. Does the company actively buy back its shares? (optional)
11. Is the stock undervalued?
 - a. The P/E Ratio must be 25 or below.
 - b. Is the current dividend yield higher than the average dividend yield?
 - c. The P/B Ratio should be 3 or less.
12. Keep emotion out of investing.

The 12 Rules of Simply Investing

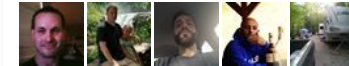


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Outlook for December 2016



As mentioned earlier, Roadmap2Retire readers get the following by using code 'roadmap2retire15' during sign up.

- One reader can get free subscription for 12 months
- Other readers can get 15% discount on the Simply Investing Report

[Simply head over to Simply Investing and sign up](#)

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2 thoughts on “Simply Investing Review”



Jay says:

Thanks for the review! I hadn't heard of this service before, but always eager to learn from other Canadian investors. It's also



cool you guys met up in real life.

Personally, I really like services that use a consistent framework to evaluate potential investment ideas. It seems like this one definitely fits the bill so I will take a closer look. Thanks again!

October 26, 2016 at 11:29 am

Reply



Roadmap2Retire says:

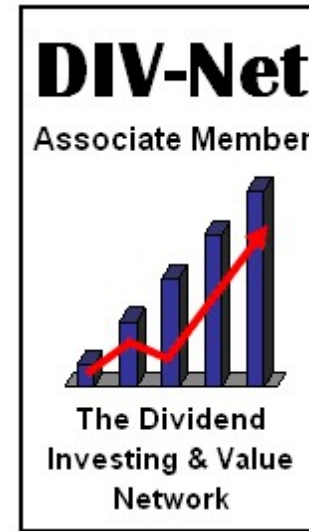
You are welcome, Jay. It seems like an interesting report...I found some good pieces of data in there.

Meeting up a fellow investor/blogger in real life was a lot of fun. I should do it more often 😊

R2R

October 26, 2016 at 5:58 pm

Reply



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