

# Company Fact Sheet

WILLIAM O'NEIL+CO.

William O'Neil + Company is a global independent equity research and advisory firm. We use a unique methodology to identify stocks with the most potential to generate alpha, as well as provide advice on market timing.

## HISTORY

Founded by William J. O'Neil in 1963. Registered in the State of Delaware.

## LEGACY

One of the first quantitative investors in the U.S., William J. O'Neil developed a unique method of stock analysis in the 1960s based on historical studies of stock price movements and characteristics of stocks that outperformed the market.

## DATABASE

Uses time-tested algorithms that identify both leading and lagging stocks based on information dating back to 1883, including 70,000 equities, funds, and indices in 70 countries from 22 market cycles.

## O'NEIL METHODOLOGY

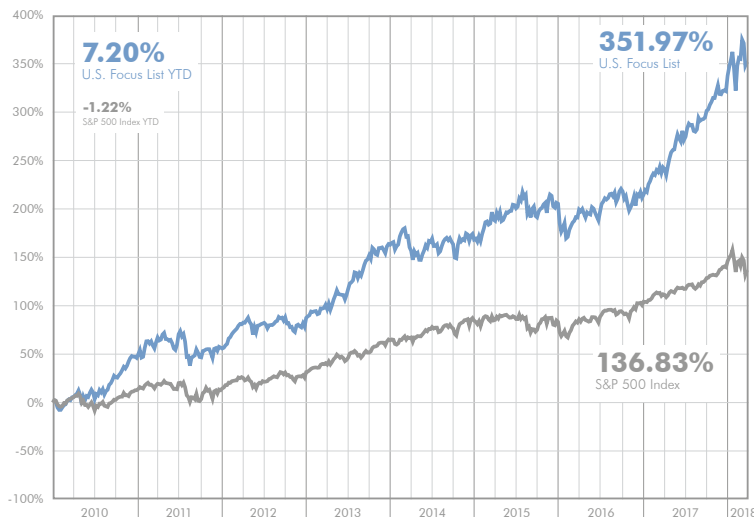
The proprietary O'Neil Methodology combines our historical data with quantitative, technical, and fundamental data and analysis to identify the best stock opportunities globally.

## SERVICES

Answers all the investment questions of "What, When, How Much." For growth investors, identifies stocks with a competitive product or service within a competitive market that are poised for earnings growth. For value and other investors, identifies laggard stocks and stocks to avoid; helps value investors avoid opportunity cost of investing in value stocks too early. For all investment styles, provides advice on market timing, entry, and exit.

## PERFORMANCE

Our U.S. Focus List has outperformed the S&P 500 by a healthy margin.



## FACTS AT A GLANCE



**1963**

year founded by  
William J. O'Neil



**70,000**

equities, funds, and  
indices in database



**200**

employees



**40**

analysts covering  
70 countries



**400+**

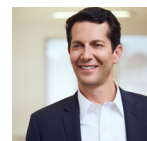
global institutional  
clients

## LEADERSHIP



**Steven Birch**

President



**Randy Watts**

Chief Investment Strategist



**Gregory Jannetta**

EVP, Institutional Sales