Management S.A. Added Value services



STOCKS MONTHLY LIST - MAY 31, 2025

PICKS OF THE MONTH

- 1) Microsoft 2) Cameco
- 3) Sika

PREFERRED STOCKS

	MTD	YTD 2025	2024	2023		
	perf.	perf.	perf.	perf.	Recommandation	
Saab Rg-B	8.2%	107.3%	53.9%	47.9%	BUY	Saab Rg-B
Banco Santander	13.7%	57.5%	18.1%	34.9%	BUY	Banco Santander
Rolls-Royce	14.8%	52.3%	89.7%	221.6%	HOLD	Rolls-Royce
Swissquote	16.4%		70.1%	53.3%	BUY	Swissquote
Netflix	6.7%		83.1%	65.1%	HOLD	Netflix
BNP Paribas	3.8%		-5.4%	17.5%	HOLD	BNP Paribas
Swisscanto (ex-ZKB) Gold	-1.0%		25.0%	14.1%	HOLD	Swisscanto (ex-ZKB) Gold ETF
Geberit	7.5%		-4.5%	23.8%	BUY	Geberit
						Boeing
Boeing	13.1%		-32.1%	36.8%	BUY	Air Liquide
Air Liquide	1.0%		-2.0%	33.0%	BUY	Cameco (NYX)
Cameco (NYX)	29.6%		19.2%	90.1%	BUY	Berkshire Hathaway B
Berkshire Hathaway B	-5.5%		27.1%	15.5%	HOLD	Microsoft
Microsoft	16.5%		12.1%	56.8%	BUY	Zurich
Zurich	-0.9%		22.6%	-0.6%	HOLD	Novartis
Novartis	0.3%		4.5%	7.1%	HOLD	Intuitive Surgical
Intuitive Surgical	7.1%		54.7%	27.1%	BUY	Palo Alto
Palo Alto	2.9%		23.4%	111.3%	BUY	Hermes
Hermes Holcim	1.5% -0.6%		21.0% 32.3%	32.8% 37.9%	HOLD BUY	Holcim
	-0.8%		52.5% 18.8%	-25.5%	BUY	Tomra Systems
Tomra Systems Roche	-0.2%		4.5%	-25.5% -15.8%	BUY	Roche
Sika	6.8%		-21.2%	23.5%	BUY	Sika
Shell (GBP)	0.8%		-3.7%	23.5% 10.6%	BUY	Shell (GBP)
Lumen Vietnam Fund	6.3%		10.6%	20.7%	BUY	Lumen Vietnam Fund
Kurita Waters	14.4%		0.4%	1.1%	HOLD	Kurita Waters
Boliden	1.3%		-1.3%	-19.6%	BUY	Boliden
Investor	-1.1%	-3.6%	25.4%	23.8%	BUY	Investor
ASML	12.3%	-3.7%	-0.4%	35.3%	HOLD	ASML
ABB	7.8%	-5.2%	31.6%	32.9%	HOLD	ABB
H&M	-2.0%	-7.9%	-15.6%	57.4%	BUY	H&M
Schneider Electric	8.4%	-8.1%	32.5%	39.1%	BUY	Schneider Electric
Stora Enso	9.1%	-8.3%	-22.4%	-4.7%	BUY	Stora Enso
Hexagon	3.1%	-8.5%	-12.7%	11.0%	BUY	Hexagon
VAT Group	6.3%	-8.8%	-18.7%	66.7%	BUY	VAT Group
Remy Cointreau	-0.3%	-19.2%	-49.2%	-27.0%	BUY	Remy Cointreau
Apple	-5.5%	-19.8%	30.1%	48.2%	HOLD	Apple
Evolution Gaming	-2.4%	-22.8%	-29.1%	18.4%	HOLD	Evolution Gaming
Novo Nordisk	4.3%			48.8%	BUY	Novo Nordisk
Sedana Medical	17.4%		-17.6%	23.9%	BUY	Sedana Medical
Xvivo perfusion	-4.0%	-37.3%	48.4%	80.1%	HOLD	Xvivo perfusion

