



STOCKS MONTHLY LIST - JUNE 30, 2025

PICKS OF THE MONTH

- 1) Microsoft
- 2) Cameco
- 3) Sika

PREFERRED STOCKS

YTD 2025 Performance

	MTD perf.	YTD 2025 perf.	2024 perf.	2023 perf.	Recommendation
Saab Rg-B	8.9%	125.8%	53.9%	47.9%	BUY
Rolls-Royce	11.7%	70.2%	89.7%	221.6%	HOLD
Banco Santander	0.0%	57.4%	18.1%	34.9%	BUY
Netflix	10.9%	50.2%	83.1%	65.1%	HOLD
Cameco (NYX)	26.8%	44.4%	19.2%	90.1%	BUY
Holcim	27.1%	32.5%	32.3%	37.9%	BUY
Swissquote	-8.7%	29.1%	70.1%	53.3%	BUY
BNP Paribas	-1.1%	28.9%	-5.4%	17.5%	HOLD
Swisscanto (ex-ZKB) Gold	0.3%	25.7%	25.0%	14.1%	HOLD
Geberit	1.8%	21.3%	-4.5%	23.8%	BUY
Boeing	1.1%	18.4%	-32.1%	36.8%	BUY
Microsoft	8.0%	18.0%	12.1%	56.8%	BUY
Palo Alto	6.4%	12.5%	23.4%	111.3%	BUY
Air Liquide	-4.0%	11.6%	-2.0%	33.0%	BUY
Novartis	2.3%	8.4%	4.5%	7.1%	HOLD
Berkshire Hathaway B	-3.6%	7.2%	27.1%	15.5%	HOLD
Tomra Systems	3.0%	7.1%	18.8%	-25.5%	BUY
Intuitive Surgical	-1.6%	4.1%	54.7%	27.1%	BUY
Shell (GBP)	4.2%	3.1%	-3.7%	10.6%	BUY
Zurich	-3.9%	2.9%	22.6%	-0.6%	HOLD
Kurita Waters	5.4%	2.8%	0.4%	1.1%	HOLD
Lumen Vietnam Fund	4.3%	2.1%	10.6%	20.7%	BUY
Roche	-2.7%	1.1%	4.5%	-15.8%	BUY
ASML	3.6%	-0.2%	-0.4%	35.3%	HOLD
Sika	-2.0%	-0.2%	-21.2%	23.5%	BUY
Hermes	-5.3%	-1.0%	21.0%	32.8%	HOLD
VAT Group	7.0%	-2.4%	-18.7%	66.7%	BUY
ABB	1.7%	-3.6%	31.6%	32.9%	HOLD
Investor	-0.9%	-4.4%	25.4%	23.8%	BUY
Boliden	-1.6%	-5.0%	-1.3%	-19.6%	BUY
Stora Enso	3.5%	-5.1%	-22.4%	-4.7%	BUY
Schneider Electric	2.0%	-6.3%	32.5%	39.1%	BUY
Hexagon	-1.5%	-9.9%	-12.7%	11.0%	BUY
H&M	-3.2%	-10.9%	-15.6%	57.4%	BUY
Evolution Gaming	14.2%	-11.9%	-29.1%	18.4%	HOLD
Apple	2.2%	-18.1%	30.1%	48.2%	HOLD
Remy Cointreau	-8.2%	-25.8%	-49.2%	-27.0%	BUY
Novo Nordisk	-3.1%	-29.6%	-10.6%	48.8%	BUY
Sedana Medical	-7.8%	-42.0%	-17.6%	23.9%	BUY
Xvivo perfusion	-7.7%	-42.2%	48.4%	80.1%	HOLD

