




SN2000 Report

Monthly Report on the US Equity Small Cap 2000

October 2018

Index Fundamentals

TTM EPS <u>RTY 2000</u> <u>SN2000</u> 32.88 83.19 Forward EPS <u>RTY 2000</u> <u>SN2000</u> 61.40 125.53 Forecast <u>RTY 2000</u> <u>SN2000</u> +86.74% +50.90%			TTM P/E <u>RTY 2000</u> <u>SN2000</u> 45.97 44.20 Forward P/E <u>RTY 2000</u> <u>SN2000</u> 24.61 29.29			TTM Div. Yield <u>RTY 2000</u> <u>SN2000</u> 1.51 1.15 Forward Div. Yield <u>RTY 2000</u> <u>SN2000</u> 1.31 0.96 Forecast <u>RTY 2000</u> <u>SN2000</u> -13.25% -16.52%		

Source: Bloomberg

Index Performance






Total Return Price Appreciation		Compound Annual Growth Rate	
1 Month	-11.31%	1 Year	3.51%
YTD	0.37%	3 Year	11.76%
1 Year	3.51%	5 Year	8.49%
3 Year	39.59%	Since Inception	8.28%
5 Year	50.32%		
Inception	349.15%		

*Returns under 1 year are not annualized


Source: S-Network as of 10/31/2018

SN2000 Sector Performance (09/30/18 – 10/31/18)		Leading Movers				
Consumer Discretionary	-9.56%	Company Name	Ticker	Opening	Closing	Change
Consumer Staples	-3.65%	REGULUS THERAPEUTICS INC	RGLS US	0.20	1.77	795.75%
Energy	-15.98%	VTV THERAPEUTICS INC	VTVT US	0.77	2.62	240.26%
Financials	-8.40%	PROTEOSTASIS THERAPEUTICS IN	PTI US	2.41	6.21	157.68%
Health Care	-14.77%	ELECTRO SCIENTIFIC INDUSTRIES INC	ESIO US	17.45	29.00	66.19%
Industrials	-12.01%	VERACYTE INC	VCYT US	9.55	14.85	55.50%
Information Technology	-11.44%	Lagging Movers				
Materials	-14.59%	Company Name	Ticker	Opening	Closing	Change
Real Estate	-12.74%	SYNERGY PHARMACEUTICALS INC	SGYP US	1.70	0.42	-75.49%
Telecommunication Services	-7.55%	META FINANCIAL GROUP INC	CASH US	82.65	25.24	-69.46%
Utilities	-3.46%	SELECTA BIOSCIENCES INC	SELB US	15.55	5.14	-66.95%
		CLOVIS ONCOLOGY INC	CLVS US	29.37	11.63	-60.40%
		IMMUNE DESIGN CORP	IMDZ US	3.45	1.44	-58.26%






Consumer Discretionary:

-  Aaron'S Inc's revenues increased +13.6% for the quarter ended September 2018 to \$953.1 million from \$838.9 million a year earlier, while net earnings rose +72.5% to \$43.7 million from \$25.3 million. [Quick Link 1](#)
-  Helen of Troy Ltd's revenues increased +14.1% for the quarter ended August 2018 to \$393.6 million from \$345.0 million a year earlier, while net income rose +392.9% to \$44.0 million from \$8.9 million. [Quick Link 2](#)
-  Chegg Inc reported a net loss of \$13.7 million for the quarter ended September 2019 compared to a net loss of \$11.5 million a year earlier, while revenues increased +18.5% to \$74.2 million from \$62.6 million. [Quick Link 3](#)
-  Steven Madden Ltd's net sales increased +3.9% for the quarter ended September 2019 to \$458.5 million from \$441.2 million a year earlier, while net income rose +25.6% to \$55.6 million from \$44.2 million. [Quick Link 4](#)
-  iRobot Corp's revenues increased +28.8% for the quarter ended September 2018 to \$264.5 million from \$205.4 million a year earlier, while net income rose +44.6% to \$31.9 million from \$22.1 million. [Quick Link 5](#)











Consumer Staples:









-  The Boston Beer Co Inc's revenues increased +24.2% for the quarter ended September 2018 to \$306.9 million from \$247.1 million a year earlier, while net income rose +12.9% to \$38.0 million from \$33.7 million. [Quick Link 6](#)

Energy:








-  EnSCO Plc reported a net loss of \$145.0 million for the quarter ended September 2018 compared to a net loss of \$25.4 million a year earlier, while revenues decreased -6.4% to \$430.9 million from \$460.2 million. [Quick Link 7](#)
-  Apergy Corp's revenues increased +22.4% for the quarter ended September 2018 to \$316.5 million from \$258.7 million a year earlier, while net income rose +37.1% to \$25.3 million from \$18.4 million. [Quick Link 8](#)
-  CVR Energy Inc's net sales increased +33.8% for the quarter ended September 2018 to \$1.94 billion from \$1.45 billion a year earlier, while net income rose +309.1% to \$90.0 million from \$22.0 million. [Quick Link 9](#)
-  Oceaneering International Inc reported a net loss of \$66.0 million for the quarter ended September 2018 compared to a net loss of \$1.8 million a year earlier, while revenues increased +9.1% to \$519.3 million from \$476.1 million. [Quick Link 10](#)
-  Rowan Cos Plc reported a net loss of \$144.1 million for the quarter ended September 2018 compared to a net loss of \$20.9 million a year earlier, while revenues decreased -33.8% to \$192.9 million from \$291.6 million. [Quick Link 11](#)

Financials:









-  First Financial Bankshares Inc's revenues increased +18.4% for the quarter ended September 2018 to \$74.1 million from \$62.6 million a year earlier, while net income rose +36.4% to \$40.1 million from \$29.4 million. [Quick Link 12](#)
-  Glacier Bancorp Inc's net sales increased +27.4% for the quarter ended September 2018 to \$122.9 million from \$96.5 million a year earlier, while net income rose +11.2% to \$49.3 million from \$44.4 million. [Quick Link 13](#)
-  Community Bank System Inc's net sales increased +2.7% for the quarter ended September 2018 to \$90.9 million from \$88.5 million a year earlier, while net income rose +22.3% to \$43.1 million from \$35.2 million. [Quick Link 14](#)
-  Old National Bancorp's net sales increased +25.8% for the quarter ended September 2018 to \$155.4 million from \$123.5 million a year earlier, while net income rose +30.4% to \$51.4 million from \$39.4 million. [Quick Link 15](#)
-  South State Corp's net sales increased +37.5% for the quarter ended September 2018 to \$143.6 million from \$104.4 million a year earlier, while net income rose +37.3% to \$49.1 million from \$35.7 million. [Quick Link 16](#)
-  BancorpSouth Inc's net sales increased +24.6% for the quarter ended September 2018 to \$163.2 million from \$130.9 million a year earlier, while net income rose +68.7% to \$66.7 million from \$39.5 million. [Quick Link 17](#)
-  Bank Of Nt Butterfield & Son's net sales increased +15.8% for the quarter ended September 2018 to \$133.0 million from \$114.9 million a year earlier, while net income rose +22.6% to \$50.4 million from \$41.1 million. [Quick Link 18](#)
-  Columbia Banking System Inc's net sales increased +41.3% for the quarter ended September 2018 to \$127.6 million from \$90.3 million a year earlier, while net income rose +13.9% to \$46.4 million from \$40.8 million. [Quick Link 19](#)
-  First Financial Bancorp's net sales increased +75.7% for the quarter ended September 2018 to \$149.2 million from \$84.9 million a year earlier, while net income rose +104.0% to \$50.7 million from \$24.8 million. [Quick Link 20](#)
-  First Midwest Bancorp Inc's net sales increased +15.1% for the quarter ended September 2018 to \$149.5 million from \$129.9 million a year earlier, while net income rose +40.3% to \$46.8 million from \$33.4 million. [Quick Link 21](#)







-  Simmons First National Corp's net sales increased +141.5% for the quarter ended September 2018 to \$55.2 million from \$22.9 million a year earlier, while net income rose +103.6% to \$56.5 million from \$27.8 million. [Quick Link 22](#)
-  American National Insurance Co's revenues increased +20.7% for the quarter ended September 2018 to \$1.05 billion from \$0.87 billion a year earlier, while net income rose +136.6% to \$173.4 million from \$73.3 million. [Quick Link 23](#)
-  Aspen Insurance Holdings Ltd reported a net loss of \$36.9 million for the quarter ended September 2018 compared to a net loss of \$282.1 million a year earlier, while net sales increased +2.4% to \$873.2 million from \$852.5 million. [Quick Link 24](#)
-  Great Western Bancorp Inc's net sales increased +10.9% for the year ended September 2018 to \$481.8 million from \$434.5 million a year earlier, while net income rose +9.1% to \$157.9 million from \$144.8 million. [Quick Link 25](#)
-  Union Bankshares Corp's net sales increased +55.5% for the quarter ended September 2018 to \$131.4 million from \$84.5 million a year earlier, while net income rose +89.8% to \$38.8 million from \$20.4 million. [Quick Link 26](#)
-  Moelis & Co's revenues increased +22.2% for the quarter ended September 2018 to \$207.7 million from \$170.0 million a year earlier, while net income rose +68.9% to \$32.5 million from \$19.2 million. [Quick Link 27](#)
-  Independent Bank Corp's net sales increased +35.8% for the quarter ended September 2018 to \$34.5 million from \$25.4 million a year earlier, while net income rose +73.9% to \$11.9 million from \$6.9 million. [Quick Link 28](#)
-  Trustmark Corp's net sales increased +5.6% for the quarter ended September 2018 to \$127.9 million from \$121.1 million a year earlier, while net income rose +4.8% to \$36.3 million from \$34.6 million. [Quick Link 29](#)

Health Care:







-  Merit Medical Systems Inc reported a net income of \$16.6 million for the quarter ended September 2018 compared to a net loss of \$3.6 million a year earlier, while net sales increased +23.6% to \$221.7 million from \$179.3 million. [Quick Link 30](#)
-  Amedisys Inc's net sales increased +11.7% for the quarter ended September 2018 to \$417.3 million from \$373.7 million a year earlier, while net income rose +115.5% to \$31.4 million from \$14.6 million. [Quick Link 31](#)
-  Novocure Ltd reported a net loss of \$11.7 million for the quarter ended September 2018 compared to a net loss of \$11.5 million a year earlier, while net sales increased +29.2% to \$64.8 million from \$50.1 million. [Quick Link 32](#)
-  Array Biopharma Inc reported a net loss of \$24.8 million for the quarter ended September 2018 compared to a net loss of \$38.0 million a year earlier, while revenues increased +91.3% to \$56.9 million from \$29.8 million. [Quick Link 33](#)
-  LHC Group Inc's revenues increased +88.0% for the quarter ended September 2018 to \$507.0 million from \$269.7 million a year earlier, while net income rose +94.6% to \$21.2 million from \$10.9 million. [Quick Link 34](#)
-  Lifepoint Health Inc's revenues decreased -1.3% for the quarter ended September 2018 to \$1.56 billion from \$1.58 billion a year earlier, while net income fell -18.9% to \$22.3 million from \$27.5 million. [Quick Link 35](#)
-  Omnicell Inc's revenues increased +9.4% for the quarter ended September 2018 to \$204.3 million from \$186.8 million a year earlier, while net income rose +118.8% to \$13.6 million from \$6.2 million. [Quick Link 36](#)

Industrials:





-  Generac Holdings Inc's net sales increased +22.7% for the quarter ended September 2018 to \$559.5 million from \$455.8 million a year earlier, while net income rose +92.1% to \$75.8 million from \$39.4 million. [Quick Link 37](#)
-  Proto Labs Inc's revenues increased +31.0% for the quarter ended September 2018 to \$115.4 million from \$88.1 million a year earlier, while net income rose +58.4% to \$20.9 million from \$13.2 million. [Quick Link 38](#)
-  Armstrong World Industries Inc's net sales increased +11.4% for the quarter ended September 2018 to \$260.5 million from \$233.9 million a year earlier, while net income rose +72.1% to \$64.2 million from \$37.3 million. [Quick Link 39](#)
-  Spirit Airlines Inc's revenues increased +31.6% for the quarter ended September 2018 to \$904.3 million from \$687.2 million a year earlier, while net income rose +62.4% to \$97.5 million from \$60.0 million. [Quick Link 40](#)
-  GATX Corp's revenues decreased -2.8% for the quarter ended September 2018 to \$349.7 million from \$359.6 million a year earlier, while net income fell -4.1% to \$47.0 million from \$49.0 million. [Quick Link 41](#)
-  Rexnord Corp reported a net loss of \$43.4 million for the quarter ended September 2018 compared to a net loss of \$24.0 million a year earlier, while net sales increased +15.6% to \$524.8 million from \$453.8 million. [Quick Link 42](#)
-  Simpson Manufacturing Co Inc's net sales increased +8.3% for the quarter ended September 2018 to \$284.2 million from \$262.5 million a year earlier, while net income rose +57.3% to \$44.4 million from \$28.2 million. [Quick Link 43](#)
-  KBR Inc's revenues increased +24.3% for the quarter ended September 2018 to \$1.28 billion from \$1.03 billion a year earlier, while net income rose +28.9% to \$58.0 million from \$45.0 million. [Quick Link 44](#)

-  Applied Industrial Technologies Inc's net sales increased +27.0% for the quarter ended September 2018 to \$864.5 million from \$680.7 million a year earlier, while net income rose +45.1% to \$48.9 million from \$33.7 million. [Quick Link 45](#)
-  Siteone Landscape Supply Inc's net sales increased +15.1% for the quarter ended September 2018 to \$578.5 million from \$502.4 million a year earlier, while net income rose +76.9% to \$29.9 million from \$16.9 million. [Quick Link 46](#)
-  SkyWest Inc's revenues increased +2.0% for the quarter ended September 2018 to \$829.3 million from \$812.7 million a year earlier, while net income rose +54.6% to \$83.1 million from \$53.7 million. [Quick Link 47](#)
-  FTI Consulting Inc's revenues increased +14.3% for the quarter ended September 2018 to \$513.0 million from \$449.0 million a year earlier, while net income fell -7.6% to \$40.2 million from \$43.5 million. [Quick Link 48](#)
-  Exponent Inc's revenues increased +8.8% for the quarter ended September 2018 to \$95.3 million from \$87.6 million a year earlier, while net income rose +19.2% to \$17.5 million from \$14.6 million. [Quick Link 49](#)
-  Mercury Systems Inc's revenues increased +35.8% for the quarter ended September 2019 to \$144.1 million from \$106.1 million a year earlier, while net income fell -58.3% to \$7.5 million from \$18.0 million. [Quick Link 50](#)

Information Technology:

-  FireEye Inc's revenues increased +7.2% for the quarter ended September 2018 to \$211.7 million from \$197.4 million a year earlier, while net income rose +83.3% to \$22.0 million from \$12.0 million. [Quick Link 51](#)
-  Belden Inc reported a net income of \$77.2 million for the quarter ended September 2018 compared to a net loss of \$7.7 million a year earlier, while revenues increased +5.5% to \$655.8 million from \$621.8 million. [Quick Link 52](#)
-  Cabot Microelectronics Corp's revenues increased +16.4% for the year ended September 2018 to \$590.1 million from \$507.2 million a year earlier, while net income rose +26.6% to \$110.0 million from \$87.0 million. [Quick Link 53](#)
-  Vishay Intertechnology Inc's revenues increased +15.2% for the quarter ended September 2018 to \$781.0 million from \$677.9 million a year earlier, while net earnings rose +20.9% to \$77.9 million from \$64.4 million. [Quick Link 54](#)
-  Qualys Inc's revenues increased +20.5% for the quarter ended September 2018 to \$71.7 million from \$59.5 million a year earlier, while net income rose +177.8% to \$23.5 million from \$8.5 million. [Quick Link 55](#)
-  CommVault Systems Inc reported a net income of \$0.9 million for the quarter ended September 2019 compared to a net loss of \$1.0 million a year earlier, while revenues increased +0.6% to \$169.1 million from \$168.1 million. [Quick Link 56](#)

Real Estate:

-  Cliffs Natural Resources Inc's revenues increased +24.3% for the quarter ended September 2018 to \$741.8 million from \$596.7 million a year earlier, while net income rose +719.9% to \$437.8 million from \$53.4 million. [Quick Link 57](#)
-  Carpenter Technology Corp's net sales increased +19.3% for the quarter ended September 2019 to \$572.4 million from \$479.8 million a year earlier, while net income rose +34.6% to \$31.5 million from \$23.4 million. [Quick Link 58](#)
-  Commercial Metals Co's net sales increased +20.8% for the year ended August 2018 to \$4.64 billion from \$3.84 billion a year earlier, while net earnings rose +199.0% to \$138.5 million from \$46.3 million. [Quick Link 59](#)
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