

SN2000 Report

Monthly Report on the US Equity Small Cap 2000

February 2020

Index Fundamentals

TTM Div. Yield <u>RTY 2000</u> <u>SN2000</u> 1.63 1.34		Forward Div. Yield <u>RTY 2000</u> <u>SN2000</u> 1.65 1.37		Forecast <u>RTY 2000</u> <u>SN2000</u> +1.02% +1.96%	
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Source: Bloomberg

Index Performance


Total Return Price Appreciation		Compound Annual Growth Rate	
1 Month	-8.27%	1 Year	-7.76%
YTD	-12.46%	3 Year	3.22%
1 Year	-7.76%	5 Year	4.95%
3 Year	9.99%	Since Inception	7.51%
5 Year	27.31%		
Inception	332.53%		

*Returns under 1 year are not annualized


Source: S-Network as of 02/29/2020


SN2000 Sector Performance (01/31/20 – 02/29/20)		Leading Movers				
Communication Services	-6.87%	Company Name	Ticker	Opening	Closing	Change
Consumer Discretionary	-11.09%	BIOXCEL THERAPEUTICS INC	BTAI US	16.57	37.50	126.31%
Consumer Staples	-6.97%	NOVAVAX INC	NVAX US	7.62	16.00	109.97%
Energy	-18.96%	STAMPSCOM INC	STMP US	74.49	141.11	89.43%
Financials	-8.85%	SUNESIS PHARMACEUTICALS INC	SNSS US	0.53	0.99	85.87%
Health Care	-3.57%	ADURO BIOTECH INC	ADRO US	1.68	3.05	81.55%
Industrials	-9.67%	Lagging Movers				
Information Technology	-6.82%	Company Name	Ticker	Opening	Closing	Change
Materials	-12.25%	TELLURIAN INC	TELL US	7.02	1.80	-74.36%
Real Estate	-7.98%	MICROVISION INC	MVIS US	0.65	0.25	-60.89%
Utilities	-7.77%	WHITING PETROLEUM CORP	WLL US	4.54	1.85	-59.25%
		NOVAN INC	NOVN US	0.52	0.22	-57.79%
		POLARITYTE INC	PTE US	3.10	1.36	-56.13%


Communication Services:


 Cogent Communications Holdings Inc's revenues increased +5.0% for the year ended December 2019 to \$546.2 million from \$520.2 million a year earlier, while net income rose +30.9% to \$37.5 million from \$28.7 million. [Quick Link 1](#)

Consumer Discretionary:


 Penn National Gaming Inc's revenues increased +47.6% for the year ended December 2019 to \$5.30 billion from \$3.59 billion a year earlier, while net income fell -53.0% to \$43.9 million from \$93.5 million. [Quick Link 2](#)

 Taylor Morrison Home Corp's revenues increased +12.5% for the year ended December 2019 to \$4.76 billion from \$4.23 billion a year earlier, while net income rose +23.4% to \$254.7 million from \$206.4 million. [Quick Link 3](#)


 Wingstop Inc's revenues increased +30.4% for the year ended December 2019 to \$199.7 million from \$153.2 million a year earlier, while net income fell -5.7% to \$20.5 million from \$21.7 million. [Quick Link 4](#)

 Hilton Grand Vacations Inc's revenues decreased -8.0% for the year ended December 2019 to \$1.84 billion from \$2.00 billion a year earlier, while net income fell -27.5% to \$216.0 million from \$298.0 million. [Quick Link 5](#)


 Lci Industries's net sales decreased -4.4% for the year ended December 2019 to \$2.37 billion from \$2.48 billion a year earlier, while net income fell -1.4% to \$146.5 million from \$148.6 million. [Quick Link 6](#)

 National Vision Holdings Inc's revenues increased +11.7% for the year ended December 2019 to \$1.72 billion from \$1.54 billion a year earlier, while net income rose +38.7% to \$32.8 million from \$23.7 million. [Quick Link 7](#)


 Crocs Inc reported a net income of \$119.5 million for the year ended December 2019 compared to a net loss of \$69.2 million a year earlier, while revenues increased +12.8% to \$1.23 billion from \$1.09 billion. [Quick Link 8](#)


 Wolverine World Wide Inc's revenues increased +1.3% for the year ended December 2019 to \$2.27 billion from \$2.24 billion a year earlier, while net earnings fell -35.8% to \$128.5 million from \$200.1 million. [Quick Link 9](#)

Energy:


 World Fuel Services Corp's revenues decreased -7.4% for the year ended December 2019 to \$36.82 billion from \$39.75 billion a year earlier, while net income rose +40.1% to \$178.9 million from \$127.7 million. [Quick Link 10](#)


Financials:


 American Equity Investment Life Holding Co's revenues increased +123.2% for the year ended December 2019 to \$3.46 billion from \$1.55 billion a year earlier, while net income fell -46.3% to \$246.1 million from \$458.0 million. [Quick Link 11](#)


 Kinsale Capital Group Inc's revenues increased +42.2% for the year ended December 2019 to \$315.9 million from \$222.1 million a year earlier, while net income rose +87.6% to \$63.4 million from \$33.8 million. [Quick Link 12](#)


Health Care:


 Acceleron Pharma Inc reported a net loss of \$124.9 million for the year ended December 2019 compared to a net loss of \$118.9 million a year earlier, while revenues increased +428.9% to \$74.0 million from \$14.0 million. [Quick Link 13](#)


 NeoGenomics Inc's revenues increased +47.7% for the year ended December 2019 to \$408.8 million from \$276.7 million a year earlier, while net income rose +31.5% to \$8.0 million from \$6.1 million. [Quick Link 14](#)


 Momenta Pharmaceuticals Inc reported a net loss of \$290.1 million for the year ended December 2019 compared to a net loss of \$176.1 million a year earlier, while revenues decreased -68.4% to \$23.9 million from \$75.6 million. [Quick Link 15](#)







 Tenet Healthcare Corp reported a net loss of \$232.0 million for the year ended December 2019 compared to a net income of \$111.0 million a year earlier, while revenues increased +0.9% to \$18.48 billion from \$18.31 billion. [Quick Link 16](#)

 Amn Healthcare Services Inc's revenues increased +3.7% for the year ended December 2019 to \$2.22 billion from \$2.14 billion a year earlier, while net income fell -19.7% to \$114.0 million from \$142.0 million. [Quick Link 17](#)










 Quidel Corp's revenues increased +2.4% for the year ended December 2019 to \$534.9 million from \$522.3 million a year earlier, while net income fell -1.7% to \$72.9 million from \$74.2 million. [Quick Link 18](#)

 Ultragenyx Pharmaceutical Inc reported a net loss of \$402.7 million for the year ended December 2019 compared to a net loss of \$197.6 million a year earlier, while revenues increased +101.4% to \$103.7 million from \$51.5 million. [Quick Link 19](#)








 Integer Holdings Corp's net sales increased +3.3% for the year ended December 2019 to \$1.26 billion from \$1.22 billion a year earlier, while net income fell -42.6% to \$96.3 million from \$168.0 million. [Quick Link 20](#)











-  lovance Biotherapeutics Inc reported a net loss of \$197.6 million for the year ended December 2019 compared to a net loss of \$123.6 million a year earlier, while revenues remain constant. [Quick Link 21](#)
-  Select Medical Holdings Corp's net sales increased +7.3% for the year ended December 2019 to \$5.45 billion from \$5.08 billion a year earlier, while net income rose +7.7% to \$148.5 million from \$137.8 million. [Quick Link 22](#)
-  Emergent Biosolutions Inc's revenues increased +42.3% for the year ended December 2019 to \$1.11 billion from \$0.78 billion a year earlier, while net income fell -13.1% to \$54.5 million from \$62.7 million. [Quick Link 23](#)
-  HMS Holdings Corp's revenues increased +4.7% for the year ended December 2019 to \$626.4 million from \$598.3 million a year earlier, while net income rose +58.6% to \$87.2 million from \$55.0 million. [Quick Link 24](#)
-  Medpace Holdings Inc's revenues increased +22.2% for the year ended December 2019 to \$861.0 million from \$704.6 million a year earlier, while net income rose +37.2% to \$100.4 million from \$73.2 million. [Quick Link 25](#)
-  Halozyme Therapeutics Inc reported a net loss of \$72.2 million for the year ended December 2019 compared to a net loss of \$80.3 million a year earlier, while revenues increased +29.1% to \$196.0 million from \$151.9 million. [Quick Link 26](#)

Industrials:




-  Exponent Inc's revenues increased +9.9% for the year ended December 2019 to \$417.2 million from \$379.5 million a year earlier, while net income rose +14.1% to \$82.5 million from \$72.3 million. [Quick Link 27](#)
-  Universal Forest Products Inc's net sales decreased -1.6% for the year ended December 2019 to \$4.42 billion from \$4.49 billion a year earlier, while net income rose +20.9% to \$179.7 million from \$148.6 million. [Quick Link 28](#)
-  Builders Firstsource Inc's net sales decreased -5.7% for the year ended December 2019 to \$7.28 billion from \$7.72 billion a year earlier, while net income rose +8.1% to \$221.8 million from \$205.2 million. [Quick Link 29](#)
-  Proto Labs Inc's revenues increased +2.9% for the year ended December 2019 to \$458.7 million from \$445.6 million a year earlier, while net income fell -16.9% to \$63.7 million from \$76.6 million. [Quick Link 30](#)
-  Brady Corp's net sales decreased -2.0% for the quarter ended January 2019 to \$276.7 million from \$282.4 million a year earlier, while net income rose +14.8% to \$33.6 million from \$29.2 million. [Quick Link 31](#)
-  Watts Water Technologies Inc's net sales increased +2.6% for the year ended December 2019 to \$1.60 billion from \$1.56 billion a year earlier, while net income rose +2.7% to \$131.5 million from \$128.0 million. [Quick Link 32](#)
-  ESCO Technologies Inc's net sales increased +5.1% for the quarter ended December 2019 to \$171.7 million from \$163.4 million a year earlier, while net earnings rose +401.0% to \$86.8 million from \$17.3 million. [Quick Link 33](#)
-  Advanced Disposal Services I reported a net loss of \$6.6 million for the year ended December 2019 compared to a net income of \$9.4 million a year earlier, while revenues increased +3.8% to \$1.62 billion from \$1.56 billion. [Quick Link 34](#)
-  Trinity Industries Inc's revenues increased +19.9% for the year ended December 2019 to \$3.01 billion from \$2.51 billion a year earlier, while net income fell -13.6% to \$137.6 million from \$159.3 million. [Quick Link 35](#)

Information Technology:


-  Inphi Corp reported a net loss of \$72.9 million for the year ended December 2019 compared to a net loss of \$95.8 million a year earlier, while revenues increased +24.2% to \$365.6 million from \$294.5 million. [Quick Link 36](#)
-  Viavi Solutions Inc's revenues increased +2.2% for the quarter ended December 2019 to \$313.7 million from \$306.9 million a year earlier, while net income rose +115.4% to \$28.0 million from \$13.0 million. [Quick Link 37](#)
-  Novanta Inc's revenues increased +1.9% for the year ended December 2019 to \$626.1 million from \$614.3 million a year earlier, while net income fell -17.0% to \$40.8 million from \$49.1 million. [Quick Link 38](#)
-  Everbridge Inc reported a net loss of \$52.3 million for the year ended December 2019 compared to a net loss of \$47.5 million a year earlier, while revenues increased +36.6% to \$200.9 million from \$147.1 million. [Quick Link 39](#)
-  Anixter International Inc's net sales increased +5.4% for the year ended December 2019 to \$8.85 billion from \$8.40 billion a year earlier, while net income rose +68.2% to \$262.9 million from \$156.3 million. [Quick Link 40](#)
-  II-VI Inc reported a net loss of \$98.2 million for the quarter ended December 2019 compared to net earnings of \$28.7 million a year earlier, while revenues increased +94.3% to \$666.3 million from \$342.9 million. [Quick Link 41](#)
-  Itron Inc reported a net income of \$49.0 million for the year ended December 2019 compared to a net loss of \$99.3 million a year earlier, while revenues increased +5.0% to \$2.50 billion from \$2.38 billion. [Quick Link 42](#)
-  Mimecast Ltd's revenues increased +25.7% for the quarter ended December 2019 to \$110.2 million from \$87.6 million a year earlier, while net income fell -54.3% to \$0.2 million from \$0.5 million. [Quick Link 43](#)

-  Brooks Automation Inc's revenues increased +17.4% for the quarter ended December 2019 to \$210.5 million from \$179.4 million a year earlier, while net income fell -9.4% to \$13.1 million from \$14.4 million. [Quick Link 44](#)
-  Vishay Intertechnology Inc's net sales decreased -11.9% for the year ended December 2019 to \$2.67 billion from \$3.03 billion a year earlier, while net earnings fell -52.6% to \$163.9 million from \$345.8 million. [Quick Link 45](#)
-  Blackline Inc reported a net loss of \$32.5 million for the year ended December 2019 compared to a net loss of \$28.7 million a year earlier, while revenues increased +26.9% to \$289.0 million from \$227.8 million. [Quick Link 46](#)
-  Rapid7 Inc reported a net loss of \$53.9 million for the year ended December 2019 compared to a net loss of \$55.6 million a year earlier, while revenues increased +33.9% to \$327.0 million from \$244.1 million. [Quick Link 47](#)
-  Acacia Communications Inc's revenues increased +36.7% for the year ended December 2019 to \$464.7 million from \$339.9 million a year earlier, while net income rose +567.5% to \$32.8 million from \$4.9 million. [Quick Link 48](#)
-  Varonis Systems Inc reported a net loss of \$78.8 million for the year ended December 2019 compared to a net loss of \$28.6 million a year earlier, while revenues decreased -6.0% to \$254.2 million from \$270.3 million. [Quick Link 49](#)
-  LivePerson Inc reported a net loss of \$96.1 million for the year ended December 2019 compared to a net loss of \$25.0 million a year earlier, while revenues increased +16.7% to \$291.6 million from \$249.8 million. [Quick Link 50](#)
-  Enphase Energy Inc reported a net income of \$161.2 million for the year ended December 2019 compared to a net loss of \$11.6 million a year earlier, while revenues increased +97.5% to \$624.3 million from \$316.2 million. [Quick Link 51](#)
-  Lattice Semiconductor Corp reported a net income of \$43.5 million for the year ended December 2019 compared to a net loss of \$26.3 million a year earlier, while revenues increased +1.3% to \$404.1 million from \$398.8 million. [Quick Link 52](#)
-  Insight Enterprises Inc's net sales increased +9.2% for the year ended December 2019 to \$7.73 billion from \$7.08 billion a year earlier, while net earnings fell -2.6% to \$159.4 million from \$163.7 million. [Quick Link 53](#)
-  PROS Holdings Inc reported a net loss of \$69.1 million for the year ended December 2019 compared to a net loss of \$64.3 million a year earlier, while revenues increased +27.1% to \$250.3 million from \$197.0 million. [Quick Link 54](#)



Materials:

-  Balchem Corp's net sales remained constant for the year ended December 2019 to \$643.7 million from \$643.7 million a year earlier, while net earnings rose +1.4% to \$79.7 million from \$78.6 million. [Quick Link 55](#)
-  Innospec Inc's net sales increased +2.0% for the year ended December 2019 to \$1.51 billion from \$1.48 billion a year earlier, while net income rose +32.0% to \$112.2 million from \$85.0 million. [Quick Link 56](#)
-  Summit Materials Inc's revenues increased +5.7% for the year ended December 2019 to \$2.22 billion from \$2.10 billion a year earlier, while net income rose +74.2% to \$59.1 million from \$33.9 million. [Quick Link 57](#)

Real Estate:

-  Kennedy-Wilson Holdings Inc's revenues decreased -26.2% for the year ended December 2019 to \$569.7 million from \$772.4 million a year earlier, while net income rose +49.4% to \$224.1 million from \$150.0 million. [Quick Link 58](#)

Utilities:

-  American States Water Co's revenues increased +8.5% for the year ended December 2019 to \$473.9 million from \$436.8 million a year earlier, while net income rose +32.0% to \$84.3 million from \$63.9 million. [Quick Link 59](#)
-  El Paso Electric Co's revenues decreased -4.6% for the year ended December 2019 to \$862.0 million from \$903.6 million a year earlier, while net income rose +45.9% to \$123.0 million from \$84.3 million. [Quick Link 60](#)

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