

Evaluating Promising Firms per Philip Fisher in Conservative Investors Sleep Well

Business Characteristics

- 1) What are the trends in the price to sales ratios for the company?
Increasing ☐ Decreasing ☐
- 2) Does the firm operate so efficiently that high margins are protected by that operational efficiency? Yes ☐ No ☐
- 3) Is the firms competitive advantage easy to identify Yes ☐ No ☐
- 4) Does the firm have the ability to enter new markets and compete against established players in those markets? Yes ☐ No ☐
- 5) When the company does enter a new market does it use ingenuity or novelty to gain traction? Yes ☐ No ☐
- 6) Does the company display excellence in areas that will help it guard against competition in markets where it is already established? Yes ☐ No ☐

Additional Notes:
