



## Validea.com Quantitative Guru Model Matrix

A breakdown of what models are included in Validea Standard & Validea Professional

| Model Name                   | Guru                  | Source (book or academic paper)   | Standard                            | Pro                                 |
|------------------------------|-----------------------|---|-------------------------------------|-------------------------------------|
| Patient Investor             | Warren Buffett        | <i>Buffettology</i>   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Value Investor               | Benjamin Graham       | <i>The Intelligent Investor</i>   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| P/E/Growth Investor          | Peter Lynch           | <i>One Up on Wall Street</i>  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Price/Sales Investor         | Ken Fisher            | <i>Super Stocks</i>   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Growth Investor              | Martin Zweig          | <i>Winning on Wall Street</i>   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Earnings Yield Investor      | Joel Greenblatt       | <i>The Little Book that Beats the Market</i>                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Growth/Value Investor        | James O'Shaughnessy   | <i>What Works on Wall Street (1st Ed)</i>                                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Low P/E Investor             | John Neff             | <i>John Neff on Investing</i>   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contrarian Investor          | David Dreman          | <i>Contrarian Investment Strategies</i>                                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Small Cap Growth Investor    | The Motley Fool       | <i>The Motley Fool Investment Guide</i>                                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Book/Market Investor         | Joseph Piotroski      | <i>Value Investing: The Use Of Historical Financial Statement Information</i> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Momentum Investor            | Validea               | <i>Validea Internal</i>   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| P/B Growth Investor          | Partha Mohanram       | <i>Separating Winners from Losers among Low Book-to-Market Stocks</i>         |                                     | <input checked="" type="checkbox"/> |
| Multi-Factor Investor        | Pim van Vliet         | <i>The Conservative Formula</i>   |                                     | <input checked="" type="checkbox"/> |
| Quant Momentum Investor      | Wesley Gray           | <i>Quantitative Momentum</i>  |                                     | <input checked="" type="checkbox"/> |
| Acquirer's Multiple Investor | Tobias Carlisle       | <i>The Acquirer's Multiple</i>  |                                     | <input checked="" type="checkbox"/> |
| Earnings Revision Investor   | Wayne Thorp           | <i>How to Profit From Revisions in Analysts' Earnings Estimates</i>           |                                     | <input checked="" type="checkbox"/> |
| Millennial Investor          | Patrick O'Shaughnessy | <i>Millennial Money</i>   |                                     | <input checked="" type="checkbox"/> |
| Twin Momentum Investor       | Dashan Huang          | <i>Twin Momentum: Fundamental Trends Matter</i>                               |                                     | <input checked="" type="checkbox"/> |
| Shareholder Yield Investor   | Meb Faber             | <i>Shareholder Yield</i>  |                                     | <input checked="" type="checkbox"/> |
| Value Composite Investor     | James O'Shaughnessy   | <i>What Works on Wall Street (4th Ed)</i>                                     |                                     | <input checked="" type="checkbox"/> |
| Private Equity Investor      | Validea               | <i>Leveraged Small Value Equities</i>   |                                     | <input checked="" type="checkbox"/> |