



3 Stocks of the Month

May 2026

Simple, Data-Driven Picks for Individual Investors

☆ #1 PICK OF THE MONTH

Burlington Stores Inc. (BURL)

Burlington Stores stands out this month as our top pick, driven by a compelling combination of strong profitability, consistent growth, and a clear upward price trend. As a leading off-price retailer, Burlington benefits from durable consumer demand for value — a trend that remains robust across economic cycles.

High ROE

Delivers strong returns on shareholder equity, signaling efficient capital allocation and disciplined management.

Strong Growth

Revenue and earnings momentum remain well above industry peers, with expanding margins as the business scales.

Clear Upward Trend

Price action confirms underlying strength — the stock has established a consistent pattern of higher highs and higher lows.

WHY BURL STANDS OUT

The Off-Price Advantage

Burlington operates in the resilient off-price retail segment, where shoppers seek quality merchandise at a discount. This model has proven especially durable during periods of inflation and economic uncertainty – exactly the environment investors face today. With a leaner cost structure and improving inventory management, Burlington is well-positioned to compound returns over the coming quarters.

Profitability

Return on Equity consistently outperforms the retail sector average, reflecting a high-quality business model.

Momentum

Institutional buying pressure and strong earnings revisions support continued price appreciation near-term.



 BEST VALUE PICK

Allstate Corp. (ALL)

Allstate earns its place as this month's best value stock through a rare combination of strong fundamentals and an attractive price relative to intrinsic worth. As one of the largest publicly traded personal lines insurers in the U.S., Allstate benefits from pricing power, a diversified product mix, and a track record of consistent execution.



Strong Fundamentals

Solid balance sheet, improving combined ratio, and disciplined underwriting support long-term earnings stability.



Reasonable Price

Trades at a valuation discount to historical averages, offering a compelling entry point for value-oriented investors.



Consistent Performance

Dividend growth history and steady EPS delivery demonstrate a reliable, shareholder-friendly capital allocation strategy.

WHY ALL STANDS OUT

Value in a Volatile Market

In an environment where growth stocks remain richly valued, Allstate offers a disciplined alternative. The company has successfully navigated elevated catastrophe losses and is now benefiting from premium rate increases flowing through its book of business. This creates a potential earnings re-rating moment – where the market catches up to the fundamental improvement already underway inside the company.

- ✔ Allstate has raised its dividend for multiple consecutive years, reflecting management's confidence in sustainable cash generation.



 HIGH-UPSIDE PICK

B2Gold Corp. (BTG)

B2Gold is our high-upside selection for May 2026 – a mid-tier gold producer with the operational footprint and financial discipline to benefit significantly from rising gold prices. For investors seeking leverage to the gold market without the risk profile of a junior miner, BTG represents a well-screened, momentum-backed opportunity.

High Growth Potential

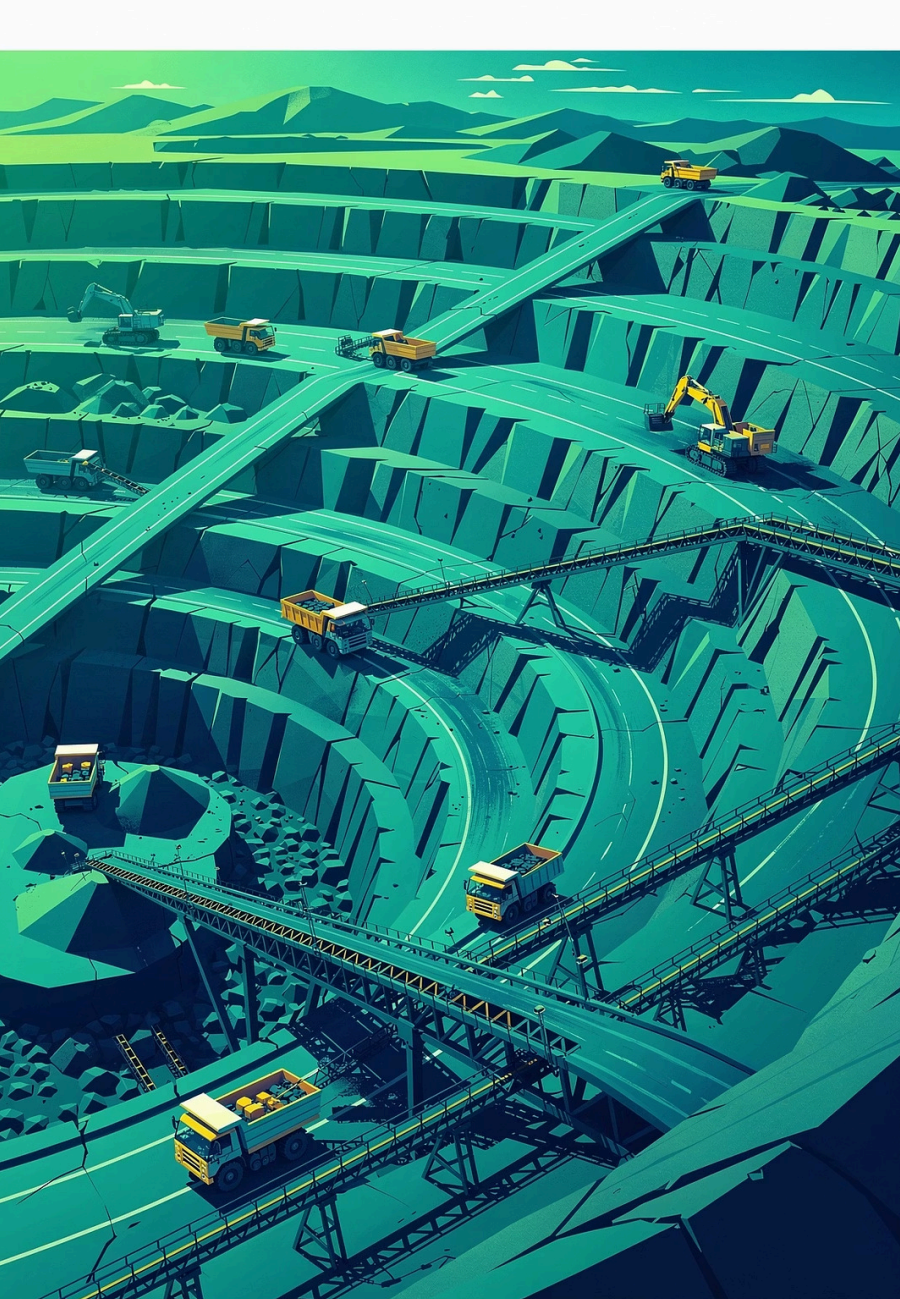
Expanding production profile and exploration pipeline create multiple pathways to significant earnings growth.

Strong Momentum

Gold price tailwinds combined with improving operational metrics are driving renewed institutional interest in BTG shares.

Screens Well

Passes rigorous quantitative screening criteria across growth, momentum, and value dimensions simultaneously.



WHY BTG STANDS OUT

Gold Leverage Without Junior Risk

B2Gold operates producing mines across multiple jurisdictions, generating real cash flow — a crucial differentiator from speculative junior miners. With gold trading near multi-year highs, the company's all-in sustaining costs provide meaningful margin expansion potential. BTG also pays a dividend uncommon among gold producers at its size, offering income alongside upside exposure.

The Bull Case

A continued gold price rally could meaningfully re-rate BTG's earnings multiple, delivering outsized returns relative to the broader market.

The Risk to Watch

Gold price reversal or operational disruption at key mines are the primary risks to monitor when sizing this position.

Final Thoughts

Three picks. Three distinct opportunities. One consistent philosophy.



Focus on Quality

Every pick this month clears a high bar for fundamental strength. Quality businesses with durable competitive advantages outperform over time – especially when markets get choppy. Don't chase noise; buy businesses worth owning.



Follow the Trend

Price trend is information. Each of this month's selections aligns fundamental strength with positive price momentum – a powerful combination that historically improves the probability of near-term outperformance.



Stay Consistent

Investing success is built through disciplined, repeatable process – not one-off bets. Review each pick monthly, size positions appropriately, and let compounding do the heavy lifting over time.

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