Free Tenfold Watchlist

Core compounders · insider buys · crypto · defensives · government contracts

Education only · Not financial advice

A balanced research shortlist across five desks.
Every number is sourced. Sources on page 3. Prices as of Nov 9 2026 5:37 PM ET.
Education only. Not a buy list. Not financial advice.

CORE COMPOUNDERS

+106%
Q2 FY27 revenue to $96.2B

NVDA NVIDIA — **$178.67**

Data center revenue hit $89.0B, up 117% year over year. Compute demand still compounding.

+103%
Google Cloud to $30.7B

GOOGL Alphabet — **$288.15**

Cloud more than doubled while total Q3 revenue reached $127.6B, up 25%.

+48%
Azure revenue growth

MSFT Microsoft — **$545.18**

Azure hit $33.2B in FY27 Q1. Microsoft Cloud rose 30% to $63.9B.

+26%
Q3 revenue to $64.6B

META Meta — **$641.37**

Ad revenue $63.1B, up 26%. Family daily active people averaged 3.64B in September.

+39%
AWS sales to $46.0B

AMZN Amazon — **$266.93**

AWS grew at its fastest clip in nearly five years. Total Q3 sales $201.9B, up 12%.

$114.5B
Sept quarter revenue

AAPL Apple — **$350.69**

Record September quarter, up 12%. Services hit an all time high. FY26 revenue about $479B.

1.74M
Active FSD subscriptions

TSLA Tesla — **$378.05**

Q3 revenue $28.0B. Cumulative deliveries hit 10.2M. Robotaxi Cybercab live in Austin.

+69%
Connectivity revenue to $5.25B

SPCX SpaceX — **$142.07**

Starlink consumer subscribers 13.6M as of Sept 30. Nasdaq Class A ticker SPCX since June 2026 IPO.

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INSIDER BUYS TO WATCH

$9.7M
CEO Lip Bu Tan buy @ $64.73

INTC Intel — $59.37
Filed Nov 4. Shares near $59 now, still close to the buy. US chip rebuild story.

$5.7M
President Zhang buy @ $18.86

APLD Applied Digital — $16.72
Filed Oct 19. CEO also bought in the same window. High density data center buildout.

$1.0M
CEO Ford Tamer buy @ $102.52

LSCC Lattice Semi — $113.89
Filed Nov 4. Stock above the buy near $114. Low power programmable chips for edge devices.

CRYPTO EXPOSURE

$60.7B
Net assets as of Nov 6 2026

IBIT iShares Bitcoin Trust — $42.32
Largest US spot bitcoin ETF by net assets. Simple brokerage access to bitcoin.

$6.64B
Net assets as of Nov 6 2026

ETHA iShares Ethereum Trust — $48.06
BlackRock spot ether trust. Brokerage exposure to ether without self custody.

$9.9M
CEO Novogratz buy @ $12.98

GLXY Galaxy Digital — $14.51
Filed Nov 5. Stock near $14.51. Digital asset banking and trading franchise.

DEFENSIVE ANCHORS

+10.1%
FY26 net sales to $297.2B

COST Costco — $1,066.18
Membership warehouse scale. FY net income $9.23B. Digitally enabled comps up about 21%.

53 yrs
Consecutive annual dividend i...

WMT Walmart — $125.66
Board raised the FY27 annual dividend to $0.99. About 280M customers visit weekly.

64 yrs
Consecutive annual dividend i...

KO Coca-Cola — $96.03
Quarterly dividend raised to $0.53. Brand moat and global beverage distribution.

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GOVERNMENT CONTRACT WINNERS

$781M
Potential CDAO MSS delivery o...

PLTR Palantir — **$169.20**

DoD delivery order W9128Z26FA001. About $638M already obligated on USAspending.

$80M
SMPES Global Strike product s...

LMT Lockheed Martin — **$588.19**

Named on the Nov 3 2026 Department of War contracts day sheet for mission planning support.

Sources opened this run

Prices Yahoo Finance chart API · Nov 9 2026 5:37 PM ET

Trimmed from v2 NOC (smallest Nov 3 DoW award) to fit TSLA + SPCX on 3 pages.

NVDA NVIDIA IR press release Aug 26 2026
GOOGL Alphabet Q3 2026 earnings call / 10-Q filed Oct 29 2026
MSFT Microsoft FY27 Q1 press release Oct 28 2026
META Meta Q3 2026 press release Oct 21 2026
AMZN Amazon Q3 2026 press release Oct 29 2026
AAPL Apple Newsroom FY26 Q4 results Nov 2 2026
TSLA Tesla Q3 2026 Update Exhibit 99.1 SEC 0001628280-26-066738
SPCX SpaceX Q3 2026 earnings (connectivity $5.248B); IR IPO pricing June 11 2026; Yahoo/Nasdaq SPCX
INTC SEC Form 4 0000050863-26-000195
APLD SEC Form 4 0001900445-26-000006
LSCC SEC Form 4 0001437749-26-034881
IBIT ETFIQ ranking of sponsor reported net assets Nov 6 2026
ETHA BlackRock / iShares ETHA product page Nov 6 2026
GLXY SEC Form 4 0001380615-26-000013
COST Costco FY26 year end release Sep 24 2026
WMT Walmart dividend release Feb 19 2026
KO Coca-Cola dividend release Feb 19 2026
PLTR USAspending CONT_AWD_W9128Z26FA001 (potential $781,321,396.95)
LMT EDGE Defense curation of DoW contracts Nov 3 2026

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