

May 2026 Addendum to the Motley Fool Advisor Fund Study of January 2026

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In the prior study (<https://www.thedoublebucket.com/resources>), it was concluded that the performance of the Motley Fool's Advisor fund over the last several years (dating back to 2017) was lagging behind its overall performance dating back to its inception (in 2002). This addendum is an update to that study over the last few months (from Jan 2026 thru May 8th 2026).

In the first 4 months of 2026, the Advisor Fund has recommended 7 different stock picks. During that time the return on those 7 stocks, on average, is up an impressive 43% compared to the S&P 500 return of 8% (please see the prior study for how those percentages are determined). Due to the low number of selections and the short time frame, this may or may not be indicative of future results. However, it is at least encouraging. Maybe this is a sign that the Advisor Fund is returning to its glory days? Only time will tell.

Going forward, we plan to publish additional addendums on a yearly basis but wanted to get this addendum out early just to be fair to the Motley Fool.

If you have any comments or questions, please submit them here:

Thank you,

P.S.:

One other finding that I've discovered recently is the performance of the "Closed Positions". Periodically, the Advisor Fund will suggest to sell one of their positions. Sometimes this happens because the stock is no longer public or has been acquired. Other times, Motley Fool simply feels that the stock is no longer worthy of being held. If you look at the performance of those closed positions, you'd expect (or hope) that their performance would be worse than the general market. However, that has not been the case. There are roughly 130 stocks on their Closed Position list that are still publicly traded. If you look at the performance of those stocks from the time they were closed until recently (05/01/2026), they have actually outperformed the S&P 362% to 260%. In other words, you would've been better off not selling those positions. In summary, not only has the Advisor Fund not been doing a good job with their "buy" suggestions in the last several years, their "sell" suggestions have suffered as well. We will dive into this topic in more detail during next year's update, but I thought it was worth mentioning at this time.