

Thoroughbred Market Report



JULY 2022

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*Dubawi, leading sire of Royal Ascot black-type winners
Photo courtesy Darley Stallions*

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- **ROYAL ASCOT REVIEW:** We look at the leading sires and damsires of black-type runners at Royal Ascot. **Dark Angel** (12) had the most black-type runners, but both his winners came in Handicap races, and **Dubawi** (11) was the undisputed champion Royal Ascot sire with four black-type winners, plus a Handicap winner. **Kodiac** also had 11 black-type runners, of which nine were in 2yo races. **Frankel**, **New Bay**, and **Sea The Stars** had 10 black-type runners each. **Galileo** had 3 black-type winners, while New Bay and **No Nay Never** (both 2yo's) had 2 black-type winners each, plus New Bay added a G1 second, tabbing him as the hottest young sire in Europe. Galileo (11) was the leading damsire of black-type runners, ahead of **Oasis Dream** and **Shamardal** (10 each).
- **FASIG JULY YEARLINGS:** Fasig-Tipton's July Yearling Sale, scheduled for July 12, kicks off the North American and European yearling sale season. The sale grossed US\$21.6-million last year, averaging \$103,887 with 208 sold/348 catalogued (59.8%). This year's sale has 13% fewer catalogued (302), so expect a drop in gross unless the average is up. As usual the sale features yearlings by first-crop sires: 9 of the 11 sires with 6+ yearlings catalogued are first-crop sires, headed by the Spendthrift trio of **Maximus Mischief** (15), **Mitole** (13), and **Vino Rosso** (13). Another Spendthrift sire, **Omaha Beach** (6), had the highest weanling/short yearling average (\$109,100) among North American F2021 sires, ahead of WinStar's **Audible** (\$100,891), who has 11 catalogued.
- **NORTH AMERICAN 2YO SALES:** The OBS June Sale (~\$27-million) finished up the North American 2yo sale season, which saw revenues up 10% from 2021, to ~\$219-million, up from \$198-million last year, with the average up 7%, from \$91,262 to \$97,515. The big story, though, was the continuing rise in market share for OBS, which grossed \$168-million from its three sales, up \$32-million from 2021, or 24%. OBS now has a 77% share of the NA 2yo market, up from 69% in 2021 and 70% in 2019. **Medaglia D'Oro** (\$517,188), **Tapit** (\$509,000), **Curlin** (\$435,329), and **Into Mischief** (\$381,410) were the top sires on average. **Justify** (\$335,420) and **Bolt D'Oro** (\$252,245 with 48 sold) were the leading first-crop 2yo sires by average.

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SECTION 1: ROYAL ASCOT REVIEW

DUBAWI RULES 2022 ROYAL ASCOT WITH 4 BLACK-TYPE WINNERS

Dark Angel Had Most Black-Type Runners with 12

There were 35 races run at Royal Ascot – the number one race-meeting in the world, hands down, no debate (don't fret, Drew, the Breeders' Cup is number two) – June 14-18, with over 273,000 souls in attendance over the five days as most of us returned for the first time since 2019. Of the 35 races, 22 were Black-Type races, with

294 declared runners (before scratches), and we thought it might be instructive to look at the sires and damsires of those 294. Not that the 13 Handicaps and Condition races, most of which were run for £100,000 purses, are to be sneezed at, but handicaps are handicaps and black type is what we see on the catalogue pages.

SIRE NAME	FFLS	ASCOT BT RUNNERS	Avg Distance		Avg Distance		1st	2nd	3rd
			2yo	2yo	3yo+	3yo+			
DARK ANGEL	2009	12	4	5.5	8	7.0	0	1	1
DUBAWI	2007	11	1	7.0	10	9.2	4	1	1
KODIAC	2008	11	9	5.3	2	6.0	0	1	1
FRANKEL	2014	10	0	-	10	10.5	1	2	1
NEW BAY	2018	10	0	-	10	9.3	2	1	0
SEA THE STARS	2011	10	2	7.0	8	13.0	1	3	1
DANDY MAN	2011	9	6	5.2	3	5.7	0	1	0
MEHMAS	2018	9	4	5.5	5	6.6	0	2	1
NO NAY NEVER	2016	8	4	5.8	4	6.0	2	0	0
HAVANA GREY	2020	7	7	5.1	0	-	0	1	1
KINGMAN	2016	7	2	6.5	5	7.0	1	0	1
GALILEO	2003	6	0	-	6	13.0	3	0	1
SHOWCASING	2012	6	4	5.3	2	6.0	1	0	0
SIOUX NATION	2020	6	6	5.0	0	-	0	0	1
STARSPANGLED BANNER	2012	6	3	6.3	3	8.7	1	0	1
BRAZEN BEAU	2017	5	2	5.0	3	5.7	1	0	0
ACCLAMATION-GB	2005	4	2	6.0	2	6.0	0	0	0
BUNGLE IN THE JUNGLE	2016	4	3	5.0	1	5.0	0	0	0
CARAVAGGIO	2019	4	1	5.0	3	7.3	0	0	0
CHURCHILL	2019	4	1	7.0	3	9.7	0	1	0
EXCEED AND EXCEL	2006	4	1	6.0	3	6.0	0	1	0
GLENEAGLES	2017	4	2	6.5	2	11.0	0	0	1
LOPE DE VEGA	2012	4	0	-	4	7.5	0	1	1
NIGHT OF THUNDER	2017	4	0	-	4	8.3	0	1	0

Dark Angel actually had the most declared runners in the 22 back-type races, with 12, though his two wins at the meeting were both in handicaps.

Dubawi and **Kodiak** had 11 black-type runners each but it was Dubawi who claimed the number one spot by black-type sire performance with four black-type winners, all 3yo's+, but significantly at distances of 6f (Naval Crown nipping Creative Force, also by Dubawi, in the G1 Diamond Jubilee), 8f (Coroebus in the G1 St James's Palace), 10f (Dubai Future in the Listed Wolferton S.), and 14f (Eldar Eldarov in the G2 Queen's Vase).

That's versatility. He added a Handicap winner for good measure.

Dark Angel's 12 black-type runners included four 2yo's (one placing) and eight 3yo's+ (one placing) but noted 2yo sire Kodiak proved that point as nine of his eleven runners were 2yo's (one placing, plus 4yo filly Campanelle dead-heating for third in the G1 Diamond Jubilee). But the point of this compilation is as much to see which sires are getting the runners good enough to merit just competing in Royal Ascot black-type races. Nine

2yo black-type runners is a pretty big statement. Though he only had six black-type runners over the four days, **Galileo** showed he is still a force to be reckoned with as he supplied three black-type winners: the filly Magical Lagoon and the colt Changingoftheguard won two 12-furlong G2 races for 3yo's, the Ribblesdale and the King Edward VII, and of course the 4yo Kyprios captured the storied G1 Ascot Gold Cup over two colts by Galileo's half-brother **Sea The Stars**, Mojo Star and Stradivarius. Sea The Stars tied Dubawi with the most Ascot black-type placegetters, with five, including the unbeaten G1 Queen Anne winner Baaed. Interestingly both Galileo and Sea The Stars averaged 13.0 furlongs for their Ascot black-type runners, not entirely surprising as between them they had the 1-2-3 in the 20-furlong Gold Cup.

Two other sires had 10 black-type runners each: Galileo's best son **Frankel**, who like Sea The Stars had his sole Ascot 2022 black-type win in a 1m G1 (the deeply impressive Inspiral, in about the hottest running of the Coronation S. ever), though the average distance for his black-type runners was 10.5 furlongs; and the rapidly-improving F2018 sire **New Bay**, whose 10 runners yielded two black-type winners, the 4yo filly Saffron Beach in the 1m G2 Duke of Cambridge and the 3yo Claymore, who won the G3 Hampton Court. Big shout out for trainer Jane Chapple-Hyam, who trained both winners and is probably going to have a yard-full of New Bays any minute now. New Bay nearly had a big breakthrough moment when the 4yo Bay Bridge added a G1 second in the Prince of Wales's, won by the now 4-time G1 winner (in four different countries) State of Rest (by **Starspangledbanner**).

The only other sire to register two black-type winners at Royal Ascot was **No Nay Never**, appropriately both 2yo's trained by Aidan O'Brien, Meditate in the G3 Albany and Little Big Bear in the Listed Windsor Castle. Through the end of 2021 No Nay Never had sired two G1 winners and eight G2 winners. Our figures show that about 20% of G1G2 winners do so as 2yo's; No Nay Never has eight out of ten (80%) who did it as 2yo's, and though he is demonstrably a superior sire of 2yo's the good news is they do train on – both of his G1 winners, Ten Sovereigns and Alcohol Free were G1 winners at both two and three.

New Bay had a whopping 3.72 APEX A Runner Index at the end of 2021, with 121 year-starters by

the end of last year, when his first 3yo's ran, and combined with 10 Royal Ascot 2022 black-type runners including two winners and a second, we're prepared to declare him about the hottest young sire on the planet. He stood this year for €37,500 but he'll never stand for so 'little' again. But he's not the only F2018 European sire, now with first 4yo's, to scale the heights. **Mehmas**, who broke the world record for 2yo winners (56) with his first crop in 2020, hasn't slowed down either. He had a 2.38 A Runner Index at the end of 2021 with 273 year-starters – more than twice as many as New Bay – and he had nine Royal Ascot black-type runners (four 2yo's and five 3yo's+), including G1 second Lusail and G1 third Acklam Express, plus 2yo G2 second Persian Force. When you see young sires putting up these kinds of numbers you don't need to go searching for any more evidence: New Bay and Mehmas are top young sires, period. Take the hint.

We've talked before about Mehmas's race record – he only ran as a 2yo, like Dark Angel, who is also by Acclamation out of a Machiavellian mare – and it seems relevant to repeat that, as a 2yo, Mehmas was second to Caravaggio in the G2 Coventry, then won the G2 July S. and G2 Richmond S., both also at 6 furlongs, and was second to Churchill in the G1 National S. at seven furlongs. Both Coolmore sires, **Churchill** and **Caravaggio** were the top F2019 sires (1st 3yo's) by number of black-type runners at Royal Ascot 2022, with four each. Churchill's Grand Alliance probably should have won the 12-furlong G2 King Edward VII, while Caravaggio had two very good one-mile G1 fourths, Maljoom in the St. James's Palace and Tenebrism in the G1 Coronation. Churchill's three 3yo Ascot black-type runners averaged 9.7 furlongs (clearly they are better as 3yo's), Caravaggio's three averaged 7.3 furlongs. Another second-crop sire, **Cotai Glory**, had three black-type runners, all 2yo's.

The two leading first-crop sires, **Havana Grey** and **Sioux Nation**, were all over the place in the 2yo races, with seven and six black-type runners each. Havana Grey had two 5-furlong placegetters; Sioux Nation had the third in the 7-furlong Chesham. Four other F2020 sires (1st 2yo's) had three black-type runners each: **Tasleet** had the winner of the G2 Coventry (Bradsell); **James Garfield** had the third in the G2 Queen Mary (Maria Branwell), while **US Navy Flag** and **Kessaar** also had three black-type runners each.

[To see a complete list of all 108 sires of black-type runners at Royal Ascot, please click here](#)

LEADING BROODMARE SIRES – PERHAPS YOU’VE HEARD OF HIM? GALILEO



Galileo, leading damsire of Royal Ascot black-type runners. Photo courtesy Coolmore

F2003 **Galileo** has broken all the records as a sire and no doubt in time he’ll do the same as a broodmare sire. He was not surprisingly the leading broodmare sire of black-type runners at Royal Ascot 2022, with 11. But he was only narrowly in front of F2005 **Oasis Dream** and F2007 **Shamardal**, with 10 each, although none of them was actually the damsire of a 2022 Royal Ascot black-type winner. But that’s not really the point here: this is the toughest race meet in the world, and they’re supplying the most runners out of their daughters. Five sires each had seven black-type runners: F1998

Pivotal; F2002 **Dansili**; F2004 **Street Cry** and **Invincible Spirit**; and F2009 **Teofilo**, who’s looking like an especially promising ‘young’ broodmare sire. All five of these except **Invincible Spirit** had a black-type winner, and he had two black-type placegetters. **Acclamation** and **Dalakhani** had six black-type runners each as broodmare sires; **Exceed And Excel** had five, and relatively younger sires F2007 **Dubawi**, F2008 **Raven’s Pass** and **Kodiac**, F2010 **New Approach**, F2011 **Sea The Stars**, and F2012 **Showcasing** had four each.

DAMSIRE NAME	FFLS	ASCOT BT RUNNERS	Avg Distance		Avg Distance		1st	2nd	3rd
			2yo	2yo	3yo+	3yo+			
GALILEO	2003	11	4	6.50	7	10.00	0	0	1
OASIS DREAM	2005	10	2	5.00	8	6.63	0	1	0
SHAMARDAL	2007	10	2	5.00	8	7.75	0	0	1
DANSILI	2002	7	2	5.00	5	7.80	1	2	0
INVINCIBLE SPIRIT	2004	7	3	5.00	4	5.50	0	1	1
PIVOTAL	1998	7	3	6.00	4	9.25	1	1	1
STREET CRY	2004	7	3	5.00	4	12.00	1	0	0
TEOFILO	2009	7	2	5.50	5	8.80	1	0	1
ACCLAMATION-GB	2005	6	3	5.00	3	9.33	1	0	0
DALAKHANI	2005	6	4	5.00	2	7.00	1	0	1
EXCEED AND EXCEL	2006	5	3	5.33	2	6.00	0	0	0
DUBAWI	2007	4	1	7.00	3	10.67	0	2	0
KODIAC	2008	4	3	5.33	1	6.00	0	0	0
NEW APPROACH	2010	4	4	6.00	0	-	0	1	0
RAVEN'S PASS	2010	4	0	-	4	10.25	1	0	0
SEA THE STARS	2011	4	1	6.00	3	11.33	1	0	1
SHOWCASING	2012	4	2	5.00	2	9.00	0	0	1

[To see a complete list of all 153 damsires of black-type runners at Royal Ascot, please click here](#)

SECTION 2: FASIG-TIPTON JULY YEARLINGS SIRE PREVIEW



*Maximus Mischief, leading sire by number of yearlings catalogued to Fasig-Tipton July sale.
Photo courtesy Spendthrift.*

FASIG JULY YEARLINGS

Fasig-Tipton kicks off the North American and European yearling sales season with their July Yearling Sale, scheduled this year for Tuesday, July 12 (their newer July Horses of Racing Age Sale is July 11), followed by Saratoga on August 8-9 and their NY-Bred Sale at Saratoga August 14-15. Saratoga grossed \$55-million and averaged over \$400,000 both in 2019 and 2021; the July Sale and the NY-Bred Sale usually gross around \$18-million each, though July 2021 grossed \$21.6-million and averaged \$103,887.

The 302 catalogued for this year's July Yearling Sale is down 13% from the 2021 sale, when 348 were catalogued, and from 364 in 2019 and 349 in 2018. In 2021 the clearance rate from the catalogue was a relatively high 59.8% (208 sold/348 catalogued); if a 60% rate can again be achieved and the average remains above \$100,000 we can project the sale should gross around \$19-million. If it breaks \$20-million again it's an even stronger-than-expected sale.

The Fasig July Sale has always 'showcased' yearlings by first-crop sires (in fact it was called "The New Sire Showcase" for a number of years), and this year is no exception. Of the exactly 100 sires with yearlings catalogued, 17 are first-crop sires but they are responsible for 106 (35%) of the yearlings catalogued, including nine of the 11 sires with 6+ catalogued. The only two sires with 6+ catalogued who are not first-crop sires are F2019 **Practical Joke** (8 catalogued) and F2014 **Dialed In** (7).

Spendthrift stands four of the nine first-crop sires with 6+ catalogued, including the top three: the 2018 G2 Remsen S. winner **Maximus Mischief**, by Into Mischief, has 15 catalogued, while three-time 2019 G1 winner **Mitole**, a half-brother to Hot Rod Charlie by Eskendereya, and 2019 G1 Breeders' Cup Classic winner **Vino Rosso**, by Curlin, have 13 each. **Omaha Beach**, by War Front and a three-time G1 winner on the dirt from 6f-9f, rounds out the Spendthrift quartet, with six catalogued. WinStar's 2018 G1 Florida Derby winner and G1 Kentucky Derby third (to Justify), **Audible**, another by Into Mischief, has 11 yearlings at Fasig July; Omaha Beach, Audible, Vino Rosso, and Mitole, in that order, were the top four first-crop sires by weanling/short yearling averages at the 2021-22 mixed sales.

Also with 6+ catalogued from their first crops: WinStar's **Yoshida** (7), a 9-furlong G1 winner on both dirt and grass by Sunday Silence's son Heart's Cry; Lane's End's **Catalina Cruiser** (6), a five-time G2 winner from 6 ½- 8 ½ furlongs by Union Rags; Darley's **Enticed** (6), a son of Medaglia D'Oro who won the G2 Kentucky Jockey Club and was second to Vino Rosso in the G2 Wood; and Darby Dan's **Flameaway** (6), a two-turn speedster by Scat Daddy. Claiborne's G1 Travers and G1 Belmont Derby winner **Catholic Boy**, by More Than Ready, and Airdrie's G1 Woodward winner **Preservationist**, by Arch, are among eight sires with five yearlings each catalogued.

FASIG-TIPTON JULY YEARLINGS SIRE PREVIEW- SIRES WITH 3+ YEARLINGS CATALOGUED

SIRE NAME	FFLS	HIS SIRE	STANDS	FARM	2020 FEE	2022 FEE	2021 YRLG	20/21 WNLG /S.YRLG	APEX A RNR INDEX	# CAT	# COLT	# FILLY
MAXIMUS MISCHIEF	2021	INTO MISCHIEF	KY	SPENDTHRIFT	7,500	7,500	-	42,778	-	15	7	8
MITOLE	2021	ESKENDEREYA	KY	SPENDTHRIFT	25,000	15,000	-	80,622	-	13	5	8
VINO ROSSO	2021	CURLIN	KY	SPENDTHRIFT	30,000	20,000	-	89,688	-	13	8	5
AUDIBLE	2021	INTO MISCHIEF	KY	WINSTAR	25,000	22,500	-	100,891	-	11	6	5
PRACTICAL JOKE	2019	INTO MISCHIEF	KY	ASHFORD	25,000	35,000	162,407	73,985	-	8	3	5
DIALED IN	2014	MINESHAFT	KY	DARBY DAN	20,000	15,000	76,515	46,781	1.65	7	5	2
YOSHIDA	2021	HEART'S CRY	KY	WINSTAR KY	20,000	12,500	-	31,508	-	7	5	2
CATALINA CRUISER	2021	UNION RAGS	KY	LANE'S END KY	20,000	15,000	-	65,316	-	6	3	3
ENTICED	2021	MEDAGLIA D'ORO	KY	DARLEY KY	10,000	5,000	-	20,759	-	6	0	6
FLAMEAWAY	2021	SCAT DADDY	KY	DARBY DAN	7,500	7,500	-	25,671	-	6	5	1
OMAHA BEACH	2021	WAR FRONT	KY	SPENDTHRIFT	45,000	30,000	-	109,100	-	6	3	3
CATHOLIC BOY	2021	MORE THAN READY	KY	CLAIBORNE	25,000	20,000	-	59,952	-	5	3	2
CLASSIC EMPIRE	2019	PIONEEROF THE NILE	KY	ASHFORD	20,000	17,500	63,902	34,375	-	5	5	0
DISTORTED HUMOR	2000	FORTY NINER	RETIRED	(WINSTAR)	50,000	-	92,733	58,286	1.86	5	4	1
KANTHAROS	2012	LION HEART	KY	HILL 'N' DALE 2017	30,000	20,000	72,727	57,250	1.69	5	3	2
MENDELSSOHN	2020	SCAT DADDY	KY	ASHFORD	35,000	35,000	152,010	70,017	-	5	2	3
PRESERVATIONIST	2021	ARCH	KY	AIRDRIE	10,000	10,000	-	32,632	-	5	4	1
STREET SENSE	2009	STREET CRY	KY	DARLEY	75,000	75,000	208,500	130,000	1.98	5	2	3
UNCLE MO	2013	INDIAN CHARLIE	KY	ASHFORD	125,000	160,000	274,185	221,429	3.19	5	5	0
BOLT D'ORO	2020	MEDAGLIA D'ORO	KY	SPENDTHRIFT FARM	25,000	20,000	156,297	96,158	-	4	3	1
COLLECTED	2020	CITY ZIP	KY	AIRDRIE	17,500	15,000	76,627	25,460	-	4	3	1
CONNECT	2019	CURLIN	KY	LANE'S END	20,000	25,000	59,244	48,727	-	4	2	2
COPPER BULLET	2021	MORE THAN READY	KY	DARBY DAN	PVT	7,500	-	12,643	-	4	3	1
GOOD MAGIC	2020	CURLIN	KY	HILL N DALE	35,000	30,000	152,118	88,175	-	4	3	1
GOOD SAMARITAN	2020	HARLAN'S HOLIDAY	KY	WINSTAR	12,500	7,500	37,441	18,367	-	4	3	1
HARD SPUN	2009	DANZIG	KY	DARLEY	40,000	35,000	80,354	61,536	1.75	4	2	2
LIAM'S MAP	2017	UNBRIDLED'S SONG	KY	LANE'S END	35,000	40,000	117,720	111,783	2.52	4	2	2
MO TOWN	2020	UNCLE MO	KY	ASHFORD STUD	10,000	7,500	59,804	27,932	-	4	2	2
MOR SPIRIT	2020	ESKENDEREYA	KY	SPENDTHRIFT	7,500	5,000	46,359	13,958	-	4	2	2
MUNNINGS	2012	SPEIGHTSTOWN	KY	ASHFORD	30,000	85,000	132,049	129,743	2.36	4	2	2
NOT THIS TIME	2018	GIANT'S CAUSEWAY	KY	TAYLOR MADE	12,500	45,000	108,700	73,636	1.76	4	1	3
WORLD OF TROUBLE	2021	KANTHAROS	KY	HILL 'N' DALE	15,000	7,500	-	23,327	-	4	1	3
CUPID	2019	TAPIT	KY	ASHFORD	10,000	5,000	34,692	21,850	-	3	2	1
FROSTED	2018	TAPIT	KY	DARLEY KY	40,000	20,000	58,082	49,091	0.73	3	1	2
INTO MISCHIEF	2010	HARLAN'S HOLIDAY	KY	SPENDTHRIFT	175,000	250,000	409,956	397,000	2.69	3	2	1
MASTERY	2019	CANDY RIDE	KY	CLAIBORNE	25,000	10,000	54,480	18,833	-	3	2	1
STREET BOSS	2010	STREET CRY	KY	DARLEY	20,000	15,000	42,100	38,444	0.78	3	1	2
TAPWRIT	2020	TAPIT	KY	GAINESWAY	10,000	10,000	50,130	26,425	-	3	1	2
UPSTART	2018	FLATTER	KY	AIRDRIE	10,000	10,000	26,000	28,792	0.64	3	1	2
VIOLENCE	2015	MEDAGLIA D'ORO	KY	HILL 'N' DALE	25,000	25,000	116,625	75,154	1.01	3	2	1

FASIG-TIPTON JULY YEARLINGS SIRE PREVIEW- ALL SIRES

SIRE NAME	FFLS	HIS SIRE	STANDS	FARM	2020 FEE	2022 FEE	2021 YRLG	20/21 WNLG /S.YRLG	APEX A RNR INDEX	# CAT	# COLT	# FILLY
ACCELERATE	2020	LOOKIN AT LUCKY	KY	LANE'S END	20,000	15,000	73,858	35,289	-	2	1	1
AIR FORCE BLUE	2018	WAR FRONT	KOR	S. KOREA (ASHFORD)	15,000	-	17,316	9,826	1.01	1	1	0
ALWAYS DREAMING	2020	BODEMEISTER	KY	WINSTAR	25,000	12,500	41,133	16,972	-	1	1	0
AMERICAN FREEDOM	2019	PULPIT	KY	AIRDRIE	10,000	6,000	33,317	8,300	-	1	1	0
AMERICAN PHAROAH	2017	PIONEEROF THE NILE	KY	ASHFORD	175,000	80,000	192,930	152,500	2.57	1	1	0
ARROGATE	2019	UNBRIDLED'S SONG	DEAD	(JUDDMONTE)	50,000	-	145,224	61,000	-	2	1	1
ASTERN	2019	MEDAGLIA D'ORO	KY	DARLEY	10,000	10,000	29,705	17,000	-	1	1	0
AUDIBLE	2021	INTO MISCHIEF	KY	WINSTAR	25,000	22,500	-	100,891	-	11	6	5
AWESOME SLEW	2020	AWESOME AGAIN	FL	OCALA STUD	5,000	4,000	29,409	-	-	1	1	0
BEE JERSEY	2020	JERSEY TOWN	KY	DARBY DAN	5,000	5,000	16,800	11,000	-	1	0	1
BERNARDINI	2008	A.P. INDY	DEAD	(DARLEY)	40,000	-	82,250	58,222	1.90	1	1	0
BLAME	2012	ARCH	KY	CLAIBORNE	35,000	20,000	124,103	76,200	2.03	1	1	0
BOLT D'ORO	2020	MEDAGLIA D'ORO	KY	SPENDTHRIFT FARM	25,000	20,000	156,297	96,158	-	4	3	1
CAIRO PRINCE	2016	PIONEEROF THE NILE	KY	AIRDRIE	25,000	15,000	45,152	54,833	0.90	1	0	1
CANDY RIDE	2006	RIDE THE RAILS	KY	LANES END	100,000	75,000	195,189	192,000	2.70	2	1	1
CATALINA CRUISER	2021	UNION RAGS	KY	LANE'S END KY	20,000	15,000	-	65,316	-	6	3	3
CATHOLIC BOY	2021	MORE THAN READY	KY	CLAIBORNE	25,000	20,000	-	59,952	-	5	3	2
CITY OF LIGHT	2020	QUALITY ROAD	KY	LANE'S END	40,000	60,000	341,077	158,444	-	2	1	1
CLASSIC EMPIRE	2019	PIONEEROF THE NILE	KY	ASHFORD	20,000	17,500	63,902	34,375	-	5	5	0
CLOUD COMPUTING	2020	MACLEAN'S MUSIC	KY	SPENDTHRIFT	7,500	5,000	49,667	14,500	-	2	1	1
COAL FRONT	2021	STAY THIRSTY	KY	SPENDTHRIFT	5,000	5,000	-	11,350	-	1	1	0
COLLECTED	2020	CITY ZIP	KY	AIRDRIE	17,500	15,000	76,627	25,460	-	4	3	1
CONGRATS	2008	A.P. INDY	RETIRED	(WINSTAR)	10,000	-	29,367	-	0.81	1	1	0
CONNECT	2019	CURLIN	KY	LANE'S END	20,000	25,000	59,244	48,727	-	4	2	2
CONSTITUTION	2017	TAPIT	KY	WINSTAR	40,000	85,000	91,394	148,048	3.39	2	1	1
CONVEYANCE	2017	INDIAN CHARLIE	WA	BLUE RIBBON	3,500	3,000	-	-	1.76	1	1	0
COPPER BULLET	2021	MORE THAN READY	KY	DARBY DAN	PVT	7,500	-	12,643	-	4	3	1
CREATIVE CAUSE	2014	GIANT'S CAUSEWAY	KY	AIRDRIE	15,000	7,500	32,550	2,250	0.78	1	1	0
CUPID	2019	TAPIT	KY	ASHFORD	10,000	5,000	34,692	21,850	-	3	2	1
CURLIN	2010	SMART STRIKE	KY	HILL 'N' DALE	175,000	175,000	409,400	310,000	3.34	2	1	1
DEMARCHELIER	2021	DUBAWI	KY	CLAIBORNE	5,000	5,000	-	20,121	-	1	1	0
DIALED IN	2014	MINESHAFT	KY	DARBY DAN	20,000	15,000	76,515	46,781	1.65	7	5	2
DISTORTED HUMOR	2000	FORTY NINER	RETIRED	(WINSTAR)	50,000	-	92,733	58,286	1.86	5	4	1
ENTICED	2021	MEDAGLIA D'ORO	KY	DARLEY KY	10,000	5,000	-	20,759	-	6	0	6
FIRST SAMURAI	2008	GIANT'S CAUSEWAY	KY	CLAIBORNE	15,000	10,000	40,600	32,500	1.34	1	1	0
FLAMEAWAY	2021	SCAT DADDY	KY	DARBY DAN	7,500	7,500	-	25,671	-	6	5	1
FLATTER	2005	A.P. INDY	DEAD	(CLAIBORNE)	40,000	35,000	134,887	93,333	1.62	1	0	1
FROSTED	2018	TAPIT	KY	DARLEY KY	40,000	20,000	58,082	49,091	0.73	3	1	2
FUNTASTIC	2020	MORE THAN READY	KY	THREE CHIMNEYS	5,000	5,000	40,500	9,375	-	1	0	1
GET STORMY	2014	STORMY ATLANTIC	DEAD	(CRESTWOOD)	7,500	7,500	21,769	8,125	1.65	1	0	1
GHOSTZAPPER	2007	AWESOME AGAIN	KY	H'N'D XALAPA	85,000	75,000	125,568	117,444	2.71	2	1	1
GIRVIN	2020	TALE OF EKATI	FL	OCALA STUD	7,500	6,000	35,235	8,544	-	1	0	1
GOLDNCENTS	2016	INTO MISCHIEF	KY	SPENDTHRIFT	25,000	15,000	37,855	20,892	1.56	2	1	1
GOOD MAGIC	2020	CURLIN	KY	HILL N DALE	35,000	30,000	152,118	88,175	-	4	3	1
GOOD SAMARITAN	2020	HARLAN'S HOLIDAY	KY	WINSTAR	12,500	7,500	37,441	18,367	-	4	3	1
GORMLEY	2019	MALIBU MOON	KY	SPENDTHRIFT	7,500	7,500	32,404	13,970	-	1	1	0
GUN RUNNER	2019	CANDY RIDE	KY	THREE CHIMNEYS	70,000	125,000	305,130	204,500	-	1	1	0
HARD SPUN	2009	DANZIG	KY	DARLEY	40,000	35,000	80,354	61,536	1.75	4	2	2
INTO MISCHIEF	2010	HARLAN'S HOLIDAY	KY	SPENDTHRIFT	175,000	250,000	409,956	397,000	2.69	3	2	1
KANTHAROS	2012	LION HEART	KY	HILL 'N' DALE 2017	30,000	20,000	72,727	57,250	1.69	5	3	2
KARAKONTIE	2017	BERNSTEIN	KY	GAINESWAY	10,000	10,000	41,000	9,775	2.02	1	0	1
KEEN ICE	2019	CURLIN	KY	CALUMET	20,000	7,500	12,300	7,500	-	1	1	0

SIRE NAME	FFLS	HIS SIRE	STANDS	FARM	2020 FEE	2022 FEE	2021 YRLG	20/21 WNLG /S.YRLG	APEX A RNR INDEX	# CAT	# COLT	# FILLY
KHOZAN	2017	DISTORTED HUMOR	FL	JOURNEYMAN, FL	10,000	8,500	31,944	18,350	1.40	1	0	1
KITTEN'S JOY	2007	EL PRADO	KY	H'N'D XALAPA	75,000	50,000	102,513	32,167	1.88	1	0	1
KLIMT	2019	QUALITY ROAD	TUR	(DARBY DAN)	10,000	-	23,279	11,271	-	1	1	0
LEOFRIC	2021	CANDY RIDE	KY	DARBY DAN	7,500	7,500	-	11,900	-	1	1	0
LIAM'S MAP	2017	UNBRIDLED'S SONG	KY	LANE'S END	35,000	40,000	117,720	111,783	2.52	4	2	2
LOOKIN AT LUCKY	2012	SMART STRIKE	KY	ASHFORD	20,000	15,000	35,938	12,300	1.86	1	1	0
MACLEAN'S MUSIC	2014	DISTORTED HUMOR	KY	HILL 'N' DALE	20,000	50,000	118,344	96,750	1.25	2	1	1
MALIBU MOON	2001	A.P. INDY	DEAD	(SPENDTHRIFT)	60,000	-	80,254	59,458	2.05	2	1	1
MASTERY	2019	CANDY RIDE	KY	CLAIBORNE	25,000	10,000	54,480	18,833	-	3	2	1
MAXIMUS MISCHIEF	2021	INTO MISCHIEF	KY	SPENDTHRIFT	7,500	7,500	-	42,778	-	15	7	8
MENDELSSOHN	2020	SCAT DADDY	KY	ASHFORD	35,000	35,000	152,010	70,017	-	5	2	3
MIDNIGHT LUTE	2010	REAL QUIET	KY	HILL 'N' DALE	15,000	15,000	59,381	29,667	1.47	1	1	0
MIDSHIPMAN	2012	UNBRIDLED'S SONG	KY	DARLEY	8,500	10,000	50,810	45,643	1.51	2	2	0
MINESHAFT	2005	A.P. INDY	KY	LANE'S END	20,000	10,000	31,286	110,000	1.31	1	0	1
MITOLE	2021	ESKENDEREYA	KY	SPENDTHRIFT	25,000	15,000	-	80,622	-	13	5	8
MO TOWN	2020	UNCLE MO	KY	ASHFORD STUD	10,000	7,500	59,804	27,932	-	4	2	2
MOR SPIRIT	2020	ESKENDEREYA	KY	SPENDTHRIFT	7,500	5,000	46,359	13,958	-	4	2	2
MUCHO MACHO MAN	2016	MACHO UNO	KY	H'N'D XALAPA	10,000	7,500	48,179	16,722	1.65	2	0	2
MUNNINGS	2012	SPEIGHTSTOWN	KY	ASHFORD	30,000	85,000	132,049	129,743	2.36	4	2	2
NOT THIS TIME	2018	GIANT'S CAUSEWAY	KY	TAYLOR MADE	12,500	45,000	108,700	73,636	1.76	4	1	3
NYQUIST	2018	UNCLE MO	KY	DARLEY	40,000	55,000	156,500	108,455	2.13	1	1	0
OMAHA BEACH	2021	WAR FRONT	KY	SPENDTHRIFT	45,000	30,000	-	109,100	-	6	3	3
OUTWORK	2018	UNCLE MO	KY	WINSTAR	15,000	10,000	30,635	11,566	0.95	2	1	1
PRACTICAL JOKE	2019	INTO MISCHIEF	KY	ASHFORD	25,000	35,000	162,407	73,985	-	8	3	5
PRESERVATIONIST	2021	ARCH	KY	AIRDRIE	10,000	10,000	-	32,632	-	5	4	1
RACE DAY	2017	TAPIT	KOR	S. KOREA (SPENDTHRIFT)	7,500	-	20,188	7,927	0.00	1	1	0
RUNHAPPY	2018	SUPER SAVER	KY	CLAIBORNE FARM	25,000	12,500	53,706	39,719	1.42	2	2	0
SKY MESA	2005	PULPIT	KY	3 CHIMNEYS	15,000	12,500	33,615	18,250	1.37	1	1	0
SPEIGHTSTER	2018	SPEIGHTSTOWN	DEAD	(WINSTAR)	10,000	-	26,908	12,428	1.06	2	1	1
ST PATRICK'S DAY	2021	PIONEEROF THE NILE	FL	JOURNEYMAN STUD	5,000	5,000	-	17,542	-	2	2	0
STREET BOSS	2010	STREET CRY	KY	DARLEY	20,000	15,000	42,100	38,444	0.78	3	1	2
STREET SENSE	2009	STREET CRY	KY	DARLEY	75,000	75,000	208,500	130,000	1.98	5	2	3
SUMMER FRONT	2017	WAR FRONT	KY	AIRDRIE STUD	10,000	7,500	18,176	6,000	0.86	2	2	0
TAKE CHARGE INDY	2015	A.P. INDY	KY	WINSTAR	17,500	12,500	-	25,208	-	2	0	2
TAPITURE	2017	TAPIT	KY	DARBY DAN	10,000	10,000	34,548	21,833	1.22	2	2	0
TAPWRIT	2020	TAPIT	KY	GAINESWAY	10,000	10,000	50,130	26,425	-	3	1	2
THE FACTOR	2014	WAR FRONT	KY	LANE'S END	17,500	17,500	33,247	25,125	1.08	2	1	1
TIZNOW	2003	CEE'S TIZZY	RETIRED	(WINSTAR)	40,000	-	44,867	9,733	1.26	1	0	1
TONALIST	2017	TAPIT	KY	LANES END	15,000	10,000	32,313	16,500	1.96	2	0	2
UNCLE MO	2013	INDIAN CHARLIE	KY	ASHFORD	125,000	160,000	274,185	221,429	3.19	5	5	0
UNIFIED	2019	CANDY RIDE	KY	LANE'S END	10,000	10,000	66,846	24,300	-	1	1	0
UNION RAGS	2014	DIXIE UNION	KY	LANE'S END	60,000	30,000	88,042	60,600	1.57	2	1	1
UPSTART	2018	FLATTER	KY	AIRDRIE	10,000	10,000	26,000	28,792	0.64	3	1	2
VINO ROSSO	2021	CURLIN	KY	SPENDTHRIFT	30,000	20,000	-	89,688	-	13	8	5
VIOLENCE	2015	MEDAGLIA D'ORO	KY	HILL 'N' DALE	25,000	25,000	116,625	75,154	1.01	3	2	1
WEST COAST	2020	FLATTER	KY	LANE'S END	35,000	15,000	66,358	29,400	-	2	2	0
WORLD OF TROUBLE	2021	KANTHAROS	KY	HILL 'N' DALE	15,000	7,500	-	23,327	-	4	1	3
YOSHIDA	2021	HEART'S CRY	KY	WINSTAR KY	20,000	12,500	-	31,508	-	7	5	2

For a complete roster of all 100 sires of yearlings catalogued at Fasig-Tipton July, please click [here](#)

SECTION 3: NORTH AMERICAN & EUROPEAN 2YO SALES



*Leading NA first-crop sire of two-year-olds in training Justify
photo courtesy Coolmore*

NORTH AMERICAN 2YO MARKET SHOWS 10% GAIN

3 OBS Sales Constituted 77% of US 2yo Market

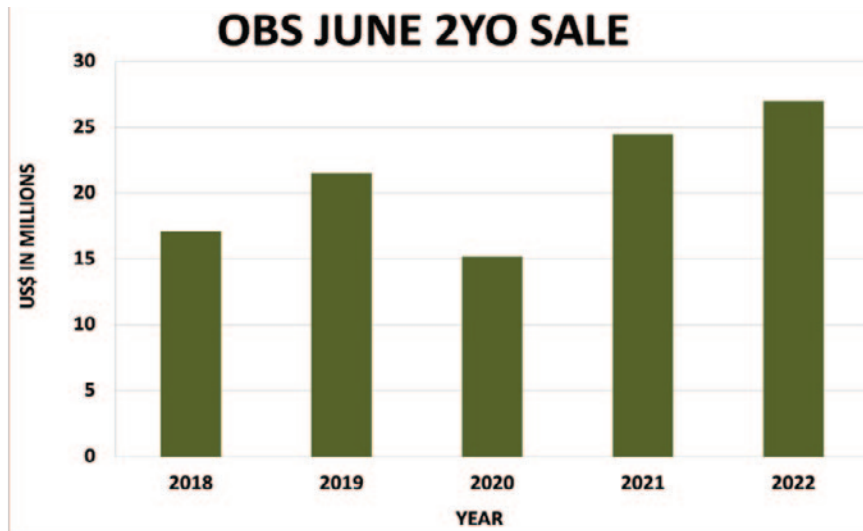
International strength in the thoroughbred market continued during the four-month North American 2yo sales market beginning with OBS March and continuing through the OBS June sale which wrapped things up. Our Worldwide Sales Ticker (see p. 10) shows that 2,245 two-year-olds (58.2% of the 3,858 catalogued) grossed US\$218,921,200, a 10% gain over the \$198-million in sales in 2021. The \$97,515 average marked a 7% gain from the 2021 average of \$91,262 and bettered the pre-pandemic high of \$95,879 in 2019. The European 2yo sales, as we reported in our June issue, were up about £2-million in 2022. Without question the most notable feature of the 2022 North American 2yo market was the continuing consolidation of the NA 2yo market in Ocala, at the three OBS sales in March (\$49.5-million +\$11.5m), April (\$92-million, +\$18m), and June (\$27-million, +\$2.5m). Taken together the three OBS sales attracted 77% of the 2yo's catalogued and generated 77% of the total North American 2yo revenues. Their three sales totaled \$168.5-million, a gain of \$32-million (+24%) from 2021, while the number catalogued and sold, and the revenues, dropped by nearly 50% at Fasig-Tipton's Gulfstream Park sale. Fasig's Mid-Atlantic Sale was up \$3.5-million but the Ocala consignors

increasingly seem to want to stay in Ocala, as OBS's market share has increased from 70% in 2019 and 69% in 2021 to 77% in 2022. The other notable trend since the pandemic has been about a 4% increase in the clearance rate from the catalogues, from around 54% in 2018-2019 to 58% in 2021 and 2022, indicating consignors are more anxious to get them sold.

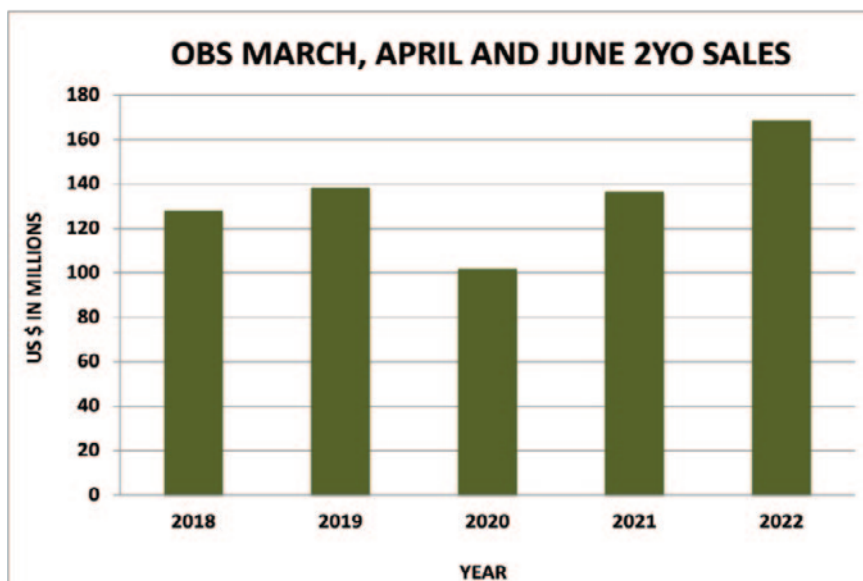
Nine sires averaged over \$250,000 with five or more 2yo's sold, headed by **Medaglia D'Oro** (8/avg \$517,188), **Tapit** (5/\$509,000), **Curlin** (10/\$435,329), and **Into Mischief** (23/\$381,810). **Bernardini's** \$3.55-million colt at the Fasig Mid-Atlantic sale propelled him to a posthumous \$336,813 average, while first-crop sires **Justify** (20/\$335,420) and **Bolt D'Oro** (48/\$252,245); **Uncle Mo** (22/\$311,875); and **Gun Runner** (13/\$274,948) also topped a \$250,000 average.

THE WORLDWIDE SALES TICKER: NORTH AMERICAN SALES DATA

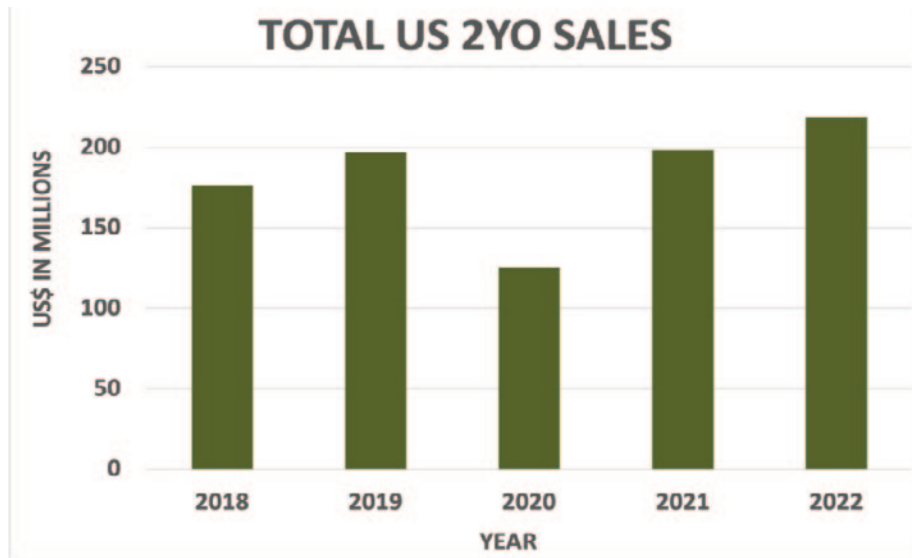
THROUGH JUNE 26, 2022



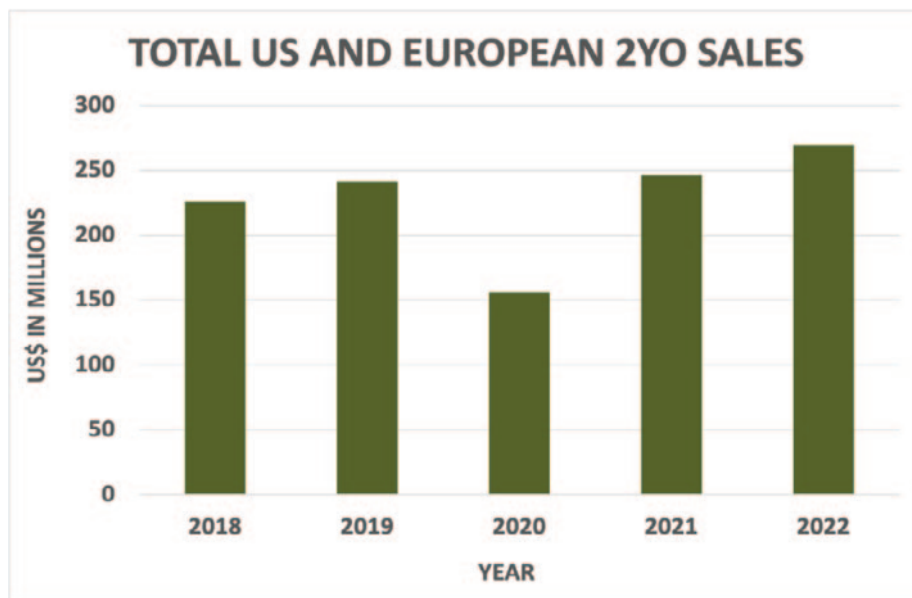
YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS \$	AVG \$
2022	1,114	806	653	27.6%	81.0%	58.6%	26,986,500	41,327
2021	906	685	560	24.4%	81.8%	61.8%	24,492,950	43,737
2020	1,100	650	498	40.9%	76.6%	45.3%	15,195,300	30,513
2019	1,041	769	615	26.1%	80.0%	59.1%	21,349,300	34,714
2018	936	665	520	29.0%	78.2%	55.6%	17,125,500	32,934



YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS \$	AVG \$
2022	2,980	2,077	1,731	30.3%	83.3%	58.1%	168,468,500	97,324
2021	2,686	1,915	1,608	28.7%	84.0%	59.9%	136,370,850	84,808
2020	3,096	1,914	1,419	38.2%	74.1%	45.8%	101,798,800	71,740
2019	2,839	2,015	1,595	29.0%	79.2%	56.2%	138,542,800	86,861
2018	2,731	1,880	1,475	31.2%	78.5%	54.0%	128,136,000	86,872



YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS \$	AVG \$
2022	3,858	2,711	2,245	29.7%	82.8%	58.2%	218,921,200	97,515
2021	3,760	2,618	2,174	30.4%	83.0%	57.8%	198,403,850	91,262
2020	3,659	2,289	1,722	37.4%	75.2%	47.1%	125,371,300	72,806
2019	3,761	2,650	2,055	29.5%	77.5%	54.6%	197,031,800	95,879
2018	3,497	2,401	1,869	31.3%	77.8%	53.4%	176,499,500	94,435



YEAR	CAT	RING	SOLD	% W/D	% S/R	% S/C	GROSS \$	AVG \$
2022	4,979	3,658	3,021	26.5%	82.6%	60.7%	269,208,505	89,112
2021	4,909	3,505	2,925	28.6%	83.5%	59.6%	246,305,292	84,207
2020	4,554	2,812	2,164	38.3%	77.0%	47.5%	155,958,702	72,070
2019	4,840	3,546	2,777	26.7%	78.3%	57.4%	241,398,789	86,928
2018	4,719	3,433	2,630	27.3%	76.6%	55.7%	225,502,125	85,742

LEADING NORTH AMERICAN SIRE OF TWO-YEAR-OLDS IN TRAINING

Thru June 27, 2022- OBS March, April, June, FT Gulfstream, Goffs Dubai, Goffs UK, Craven UK, Tatts Guineas, Arqana, Goresbridge - Sires with 2+ sold for 105k+ average.

SIRE NAME	YOB	HIS SIRE	FFLS	ST	2022 FEE	2019 FEE	# CAT	# RING	# SOLD	US\$ AVG	US\$ MED
MEDAGLIA D'ORO	1999	EL PRADO	2006	KY	5,000	200,000	22	13	8	517,188	252,500
TAPIT	2001	PULPIT	2006	KY	185,000	225,000	8	7	5	509,000	250,000
CURLIN	2004	SMART STRIKE	2010	KY	175,000	175,000	18	10	10	435,329	437,500
INTO MISCHIEF	2005	HARLAN'S HOLIDAY	2010	KY	250,000	150,000	49	28	23	381,810	250,000
MIZZEN MAST	1998	COZZENE	2004	RETIRED	-	10,000	3	2	1	350,000	350,000
BERNARDINI	2003	A.P. INDY	2008	DEAD	-	50,000	29	17	15	336,813	70,000
JUSTIFY	2015	SCAT DADDY	2020	KY	100,000	150,000	38	21	20	335,420	260,118
UNCLE MO	2008	INDIAN CHARLIE	2013	KY	160,000	125,000	47	28	22	311,875	112,500
U S RANGER	2004	DANZIG	2011	CA	-	3,000	1	1	1	280,000	280,000
GUN RUNNER	2013	CANDY RIDE	2019	KY	125,000	70,000	27	13	13	274,948	320,000
BOLT D'ORO	2015	MEDAGLIA D'ORO	2020	KY	20,000	25,000	73	60	48	252,245	175,000
UPSTART	2012	FLATTER	2018	KY	10,000	10,000	7	7	6	232,500	240,000
MSHAWISH	2010	MEDAGLIA D'ORO	2018	KY	5,000	10,000	3	1	1	230,000	230,000
NYQUIST	2013	UNCLE MO	2018	KY	55,000	40,000	39	26	23	227,326	200,000
AMERICAN PHAROAH	2012	PIONEEROF THE NILE	2017	KY	80,000	110,000	28	19	17	225,829	140,000
GOLDEN LAD	2010	MEDAGLIA D'ORO	2017	MD	5,000	5,000	2	1	1	215,000	215,000
FIRING LINE	2012	LINE OF DAVID	2018	KY	5,000	5,000	1	1	1	210,000	210,000
RACE DAY	2011	TAPIT	2017	KOR	-	6,000	6	5	4	206,250	152,500
MACHO UNO	1998	HOLY BULL	2005	RETIRED	-	10,000	1	1	1	200,000	200,000
MORE THAN READY	1997	SOUTHERN HALO	2002	KY	50,000	80,000	43	31	22	199,271	105,000
SQUARE EDDIE	2006	SMART STRIKE	2011	RETIRED	-	25,000	4	4	3	198,333	140,000
RUNHAPPY	2012	SUPER SAVER	2018	KY	12,500	25,000	17	10	9	195,889	130,000
FLATTER	1999	A.P. INDY	2005	KY	35,000	40,000	12	8	8	192,500	130,000
JAVA'S WAR	2010	WAR PASS	2018	ON	2,500	-	1	1	1	175,000	175,000
ARROGATE	2013	UNBRIDLED'S SONG	2019	DEAD	-	75,000	24	15	10	174,161	118,303
MUNNINGS	2006	SPEIGHTSTOWN	2012	KY	3,500	20,000	68	31	22	173,632	81,000
STREET SENSE	2004	STREET CRY	2009	KY	75,000	50,000	24	12	11	173,455	100,000
CITY OF LIGHT	2014	QUALITY ROAD	2020	KY	60,000	35,000	47	24	17	167,588	90,000
WAR FRONT	2002	DANZIG	2008	KY	100,000	250,000	13	8	6	162,875	152,500
MENDELSSOHN	2015	SCAT DADDY	2020	KY	35,000	35,000	66	46	40	162,250	92,500
PEACE AND JUSTICE	2010	WAR FRONT	2018	PA	PVT	-	5	2	1	150,000	150,000
MOHAYMEN	2013	TAPIT	2019	KY	7,500	7,500	1	1	1	145,000	145,000
BAYERN	2011	OFFLEE WILD	2017	KOR	2,500	15,000	4	4	4	143,750	137,500
RIDE ON CURLIN	2011	CURLIN	2018	FL	-	5,000	5	3	2	138,500	138,500
TWIRLING CANDY	2007	CANDY RIDE	2013	KY	60,000	25,000	35	27	24	138,317	82,500
SKY MESA	2000	PULPIT	2005	KY	12,500	15,000	7	5	4	137,500	65,000
SPEIGHTSTOWN	1998	GONE WEST	2006	KY	90,000	80,000	21	12	12	137,245	100,000
MALIBU MOON	1997	A.P. INDY	2001	DEAD	-	75,000	45	36	32	135,283	82,500
VIOLENCE	2010	MEDAGLIA D'ORO	2015	KY	25,000	40,000	32	24	20	133,350	77,500
FRIESAN FIRE	2006	A.P. INDY	2013	MD	-	4,000	3	3	3	133,000	35,000
IRISH WAR CRY	2014	CURLIN	2020	MD	6,500	6,500	2	2	2	132,500	132,500
CUSTOM FOR CARLOS	2006	MORE THAN READY	2013	LA	-	3,500	1	1	1	130,000	130,000
JACK MILTON	2010	WAR FRONT	2017	KY	6,500	6,500	2	2	2	130,000	130,000
GOOD MAGIC	2015	CURLIN	2020	KY	30,000	35,000	74	49	42	129,695	82,500
PRACTICAL JOKE	2014	INTO MISCHIEF	2019	KY	35,000	30,000	63	45	37	120,843	85,000
LEMON DROP KID	1996	KINGMAMBO	2002	RETIRED	-	25,000	3	3	3	120,067	60,000
BEE JERSEY	2014	JERSEY TOWN	2020	KY	5,000	5,000	13	8	7	118,286	120,000
LIAM'S MAP	2011	UNBRIDLED'S SONG	2017	KY	40,000	20,000	36	18	17	115,971	80,000
WEST COAST	2014	FLATTER	2020	KY	15,000	35,000	57	44	37	114,919	60,000
SHACKLEFORD	2008	FORESTRY	2014	KOR	-	20,000	10	8	7	111,364	75,000
TAMARKUZ	2010	SPEIGHTSTOWN	2018	LA	5,000	10,000	2	2	1	110,000	110,000
LAOBAN	2013	UNCLE MO	2018	DEAD	-	7,500	7	5	5	105,000	65,000

[For a complete roster of all 228 sires of North American 2yos, please click here](#)