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Today's Stock Traders' and Investors' Free Wrap is based on  
An **EXTRACT** from Edition 528 of our Mentoring style  
'Investing & Online Trading' Report

## Trading / Investment Returns

By *Jim Berg and John Atkinson*

### How are you doing in the Market?

The last year has been a difficult time for traders and investors.

The **ASX200** return over calendar year 2014 was only **+ 1.1 %** and is currently **negative** for 2015.

The **Australian Stock Exchange** recently experienced one of its worst sell-offs in history and the potential is for more to come.

**Table 1**

	Date	XJO		
Highest High of 2015:	3/03/2015	5996.90		
Lowest Low of 2015 :	25/08/2015	4928.30		
High - Low Range in 2015 as at 3/9/15:		-1068.60	i.e	-17.8%

Table 1 above shows that in Australia, as at 3 September, from its High in March 2015 to its Low on 25 August, the ASX 200 (XJO) fell **-17.8%**.

**Table 2**

	Date	S&P500		
Highest High of 2015:	20/05/2015	2134.72		
Lowest Low of 2015 :	24/08/2015	1867.01		
High - Low Range in 2015 as at 3/9/15:		267.71	i.e	12.5%

Similarly, Table 2 above shows that in the USA, from its High in May 2015 to its Low on 24 August, the S&P500 fell **-12.5%**.

With a disciplined, unemotional, rule based trading strategy you should be outperforming the Index.

In early November 2014, [Jim Berg's Trading and Investing Signals Service](#) was launched to a pilot group of traders and investors who had previously expressed interest. History now shows:

- A market correction occurred soon after the launch, with losses on 4 of the first 5 trades for both Australia and USA.

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- Conditions subsequently improved, with 6 of the next 14 USA trades and 8 of the next 12 Australian trades being profitable.
- In early February 2015, warnings appeared, so Jim immediately ceased adding any new Signals to his Investing Signals Service but continued to manage 'open' Investing Signals positions. He correspondingly reduced the Investing Membership to \$1 a fortnight until further notice.
- Jim left his Trading Signals Service open, but in March 2015 additional warning lights flashed, so Jim:
  - ✓ Issued his Caution Notice in this Report and to Signals Members
  - ✓ Ceased adding new positions to this Report's notional Portfolio and any new 'long' Signals to his Trading Signals Service positions
  - ✓ Continued to manage 'open' Trading Signals positions and progressively closed them out as they triggered his Initial, Adjusted, Trailing or Market stops or achieved his Profit Targets, as applicable.
- Jim then waited patiently 'in cash' with 'capital protected' and earning interest for several weeks while global markets started to fall.
- Subsequently, first the XJO, then the DOW and then the S&P 500 confirmed their switches from rising to falling trends by Jim's documented definitions and Rules, as developed by him over more than 30 years of trading many markets.
- Recently, Jim added the first Australian falling trend Signal to his Trading Signals Service, **with the aim of profiting when markets fall.**
- On Monday 24 August 2015, USA markets tumbled, with their largest fall in 4 years and market participants panicked, with the VIX (often known as the 'Fear Index') soaring.
- In contrast, on Tuesday 25 August, while many Market participants were worrying what to do after the big falls in USA the night before, our Trading Signals Members had already received a Signal to EXIT their new 'open' falling trend position at a **PROFIT** as it had now triggered a JB Profit Taker exit by Jim's Rules, developed over 30+ years.
- In Edition 527 of our [weekly Report](#), we showed how Jim's Signals Members' first falling trend trade was closed on 25 August 2015 with a **12.7%** profit, as republished below:



( This chart and other charts shown by Jim Berg in his Report are drawn using [JB Premium Charts](#) which include Jim's unique Volatility Indicators, history data and 12 months of [JB Premium Data](#).)

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Table 3

USA				Australia			
	Date	S&P 500 Close			Date	XJO Close	
	3/11/2014	2017.81			31/10/2014	5526.60	
	3/09/2015	1951.13			3/09/2015	5027.80	
Fall in S&P500 over 10 months:		<b>-66.68</b>	i.e		Fall in XJO over 10 months:	<b>-498.80</b>	i.e <b>-9.0%</b>

Table 3 above shows that the S&P 500 fell **-3.3%** over the 10 months since Jim's Signals opened and the ASX 200 (XJO) fell **-9.0%**.

In contrast, with all this happening, here is a Summary on how Jim's Australian Trading Signals for a notional \$100k portfolio have performed over the same period, as at 3 September 2015:

- |   |                |
|---|----------------|
| 1) Rising Trend: Net Trading Profits & Dividends:<br>(after Losses & Transaction costs) | <b>\$3,265</b> |
| 2) Interest on cash in remainder of portfolio:.....<br>(at 2.5% pa)                     | <b>\$1,475</b> |
| 3) Falling Trend: First Trading Profit:<br>(12.7% in 4 weeks- see above)                | <b>\$2,500</b> |
| <b>TOTAL Gain</b>   | <b>\$7,240</b> |

This equates to a gross return\* of **7.2%**, while over the same time period the **ASX200** was down **-9.0%** (see above).

That is an outperformance figure\* of **+16.2%**.

For Jim's USA Trading Signals, the corresponding gross Total Gain\* is **\$3,371**, or **3.4%**, with a corresponding outperformance figure\* against the S&P 500 of **+6.7%**

For completeness, we need to adjust these results to account for the Trading Signals membership fees. In practice, these subscriptions cover both USA and Australian Signals, so they should be split between these.

However, as some Members may only be interested in trading Australian shares to start, then if we deduct the Membership subscriptions from the Australian figures only, this slightly reduces the final outperformance figure of Jim's Trading Signals vs the XJO above, to **+13.5%**

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**PLEASE NOTE:**

**Starting today**, Jim Berg's new Trading Signals Service is **now open** to traders and investors around the world.

[See page 4 below](#) for your invitation to become an inaugural Member.

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## New! Your Invitation to Become an Inaugural Member of Jim Berg's Trading Signals Service



A falling trend can last for months, even years.

Traders/investors will have to make some important decisions:

- 1) Hold on to existing positions and even add to them. This can be painful if markets continue to fall.
- 2) Go to cash. If markets continue to fall they will sleep well and 'outperform' the market and most professionals
- 3) Trade the 'path of least resistance', with the aim of profiting from a falling market and 'outperforming' by a considerable margin

Want to learn more?

Jim Berg's new Trading Signals Service is **now open** to traders and investors around the world.

Membership of Jim's Signals will be limited and based on liquidity, particularly for the Australian market - so we expect to close the doors for Australian Signals Members first.

For more information on Jim Berg's new Signals Service and to get started, we invite you to go now to:



<http://www.sharetradingeducation.com/TradingSignals.aspx>

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