If You're in the Market You Need
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Your Free Wrap today is based on an extract from Edition 640 of our weekly Mentoring-style '*Investing & Online Trading' Stock* Report

Coming Soon:

Our new "Super 10 ETF Portfolio"

By John Atkinson

1. "..EXTRA wealth through additional multiple income streams?"

Each week in this Report we show you how to trade with Jim's common sense and proven '*Weight-of-Evidence'* approach.

Since July 2005, many Members have developed their skills through this Report, Jim's Signals Services and his other resources to allow them to supplement their income and some have informed us that they have been able to position themselves to be able to trade for a living.

The share market typically goes in cycles, ranging from periods of strong growth; through periods when the market is weak (when Jim may have caution in place for months), to other times when the market switches to a falling trend.

Through all these components of typical market cycles, we show you Jim's view each week and our aim is to teach you how to cross the minefield of the market wisely, safely and with confidence, using Jim's approach.

Some Members prefer to take short term profits using *daily charts.* Some prefer to increase their potential for dividend income and to '*let profits run'* using *weekly charts* and Jim's weekly investing strategies.

Others may choose to do both, i.e. to split their portfolio so they can have a proportion of their funds invested longer term in one account - while also developing extra cash flow with short term trading profits in a second account.

"*What else can we do to diversify and create EXTRA wealth through additional multiple income streams?"*

This powerful question was asked a few months ago over dinner by a close friend who had recently retired, is already an investor in the share market, is not planning to go back to work or set up a business and does not want to have "..*all his eggs in one basket*".

We then proceeded to talk about the two common alternatives for those investors looking to diversify and add more to their '*basket*':

2. Real Estate

First, the discussion around our table that night centred on Real Estate.

The feeling was that in recent years, those investors already holding real estate in Australian cities have seen some substantial capital growth, though this now appears to be slowing in Melbourne and Sydney.

Some cities, such as Brisbane and Darwin, are now even seeing prices fall back significantly due to insufficient demand and excess supply.

On the other hand, those investors wanting to get started in real estate today may have missed the boat, may not have sufficiently deep pockets and/or the desire to *'put their heads on the block'* to borrow hundreds of thousands of dollars to get a foothold - particularly with the real risk of rising interest rates (and hence repayments) in the next few years.

Those who are retired probably cannot get a loan to buy property, unless they can show sufficient separate income to service that loan. Other non- retired investors may also no longer be able to get a loan, as they may not meet the recently introduced tougher regulations.

In addition, the rental returns on many of those properties have tended NOT to keep pace with that growth, so percentage-wise, many real estate yields have also fallen back.

It was felt that for those investors prepared to go down the track of what often ends up as a hassle of renting their properties to tenants -along with the associated maintenance costs – annual yields *in the order of 5% (or less)* are now not uncommon.

3. Cash

Investing in cash was suggested next, though here's where the conversation was particularly flat.

We discussed that previously Bank Interest deposits yielded investors 5%.... 10% …pa .and much more years ago.

That meant healthy yields for many retirees to live on. The general consensus was that those days appear to be long gone – at least for the foreseeable future.

In fact, today I searched for the latest comparative Bank deposit rates and confirmed our discussion that currently you would be lucky to find much more than *3% pa on Bank Deposit* – and that's if you lock it away for *5 years*. I found many Banks are offering closer *to 2.0% to 2.5% on shorter terms,* i.e. not much more than inflation.

4. ETFS as a practical alternative addition….

That night, in the conversation with my close friends, I mentioned the use of Exchange Traded Funds (ETFs) as a practical alternative addition for investors looking to create extra wealth to ADD to their share trading and investing portfolios, without the need for tenants or loans – and with the potential to outperform real estate yields and Bank deposit returns if done properly.

My suggestion was obviously a new concept to them, so I shared briefly some facts re the Australian ETF market from my own reading (as part of my ongoing annual training):

- In the year to May 2017, funds under management rose by 25% or $5.8 billion. This gain was composed of both capital gains and net new money. Overall, the capitalisation of the ASX ETF market is now around $29 billion.
- The number of ETF investors has grown to 265,000, so over a quarter of a million Australians now have ETFs in their portfolio, with 63,000 new ETF investors added in the last 12 months, the largest number added in a 12-month period in Australia,"
- The increased liquidity and accessibility of ETFs is attracting investors of all ages – from Millennials (those born in the early 1980s to mid-1990s) through to baby boomers/retirees

I explained that the following re ETFs was general advice only (so may not apply to them):

1. Unlike real estate, there are no legal fees, stamp duties or LMI loan fees on settlement and if you need cash at any time, you do not have to sell the whole investment

2. ETFs can be bought and sold simply, just like shares, except there is a small management cost (in the order of ~ 1 to 2 %)

3. Similar to shares, many ETFs pay dividends, which allow extra yields to be added to capital growth

4. Generally, ETFs are NOT stock specific - they are typically spread across many components. As a result, they tend to be less volatile than individual shares.

5. There are over 250 ETFs in Australia alone (and many more available for investors in other countries such as USA).

6. Originally, ETFs were based on key Indices. e.g. ASX200, S&P500 etc. With the ever increasing range of ETFs, Australians can now invest in many markets, including global banks, emerging/Asian/European markets, global health and many more - without the need to leverage, open international accounts or worry about exchange rates.

7. The addition of ETFs can be regarded as a natural progression for those investors and traders (e.g. after they have learnt how to trade shares safely and wisely) -- as another "*string to their bow*" as an additional income stream for creating wealth.

5. "Back to the drawing board."

In my '*first life*' as a Civil Engineer in the 70's, I was engaged as a Geotechnical Engineer by a large design consultancy in Southern Africa.

For 3 years, my Manager and I were flown in to help other engineers sort out their significant geotechnical problems - including large rock slope failures, blasting close to the foot of dams and even a tunnel collapse once - for which we had to introduce ground freezing for the first time in Africa.

After each of those site inspections, I sat for many days (and sometimes weeks) at a drawing board - pioneering new solutions to these diverse geotechnical problems.

Similarly, since that memorable dinner conversation with friends, behind the scenes I have spent the last few months back at the drawing board – only this time with financial and not geotechnical calculations…..

Over that time, I have personally and manually studied the chart patterns of over 250 ETFs in Australia one by one.

My aim was to design an ETF Portfolio with ***10 ETFs in rising trends***, such that Investors:

1) Can join us at any time once its opened, then invest in *exactly the same ETFs* AND

2) Thereby match the performance of that ETF Portfolio on a monthly basis.

To do so, here are just 4 of the key problems which needed to be solved:

1. How to choose WHICH 10 of the 250 ETFs to include?

2. Once ETFs are in stable rising trends, they tend not to correct and give as many JB Volatility Blue Bar Entry Signals as shares – so I needed to develop *a new Initial Entry approach for ETFs.*

3. For investors who miss the initial entry, but want to enter the same trade later, I also needed to find a new and easy-to-follow method - with a range of safe entry prices.

4. New Money and Risk Management Rules, designed specifically for this ETF Portfolio. After all ETFs are still subject to unexpected market movements and global events.

Those who know me well know it takes a lot to get me excited.

Well, I'm very pleased to announce that after months of trial and testing, last week I became ***very*** excited when I '*cracked the code'* and discovered practical and realistic solutions to the 4 key problems above.

Behind the scenes, Jim and I are now reviewing and '*tweaking*' this discovery.

Then, when we're completely happy with the final design, we plan to announce the launch of the new **'Super 10 ETF Portfolio'** - and make it available to a limited number of investors initially.

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Join Waiting List

If you would like to be one of the first to be notified of the launch of this new Initiative (*with no obligation*), simply email me at John@ShareTradingEducation.com and Jim and I will add you our Waiting List.

In the subject line, please write **'Super 10 ETF Portfolio Wait List'** *to express your interest*.

…….. To Continue Reading…

In this week's EDITION 640:

- Read our latest views on the Australian and USA markets.
- Discover how to use Jim Berg's world famous JB Volatility Indicators and common sense *'Weight-of-Evidence'* approach - to help you confidently know:
  1. **WHICH** stocks / shares to Buy
  2. **WHEN to BUY** and, more importantly,
  3. When to **SELL**
- You also receive Jim Berg's ***3 latest Alerts Watch Lists*** for Australia & USA - of those stocks & shares *which have recently passed most of Jim Berg's entry criteria*

To continue reading, order your copy now of **this week's Edition 640** of Jim's *'Investing and Online Trading'* mentoring style newsletter *(only AU$9.97*

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"Your Master Class Course is truly the right thing at the right time"

Dear John,

It has been a tonic talking to you ...thank you for your time and patience.

As discussed, there are only 2 groups of educators I really trust in the market and the Berg-Atkinson team is one of them.

Your great strength is that you are so thorough and so conservative. It's a must in the share market.

Your '*Master Class Course*' is truly the right thing at the right time.

Having viewed and reviewed your (Free) MasterClass Webinar *' 7 Key Steps to Survive & Thrive in the Stock Market'* concerning the benefits - indeed one could say necessity - of subscribing to this excellent offer, your presentation dictates that I take advantage of this opportunity to assist in my becoming a much better informed investor. And more financially productive.

I look forward to re-acquainting myself with the disciplines of this most appreciated and valuable resource, being aware of its success and your well - earned reputation as being of the highest integrity in the industry.

If ever there is a time for investors to hold their breath and re-examine their protocols, now is that time.

Donald Swain, Private Investor, Melbourne, September 2017

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'7 Key Steps to Help You Survive and Thrive in the Stock Market'

Make sure you ***watch this Master Class webinar***
- *before you risk another dollar in the market…..*

Simply click on this link to Start Your Free Webinar Now ==>

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Examples from the Australian and USA markets are provided to demonstrate that Jim Berg's principles may be used globally. This educational material is from an Australian source and complies with Australian law and not necessarily any other (local) law.

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OFFICES: Copacabana, NSW 2251, Australia and Glen Iris, Victoria 3146, Australia.

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