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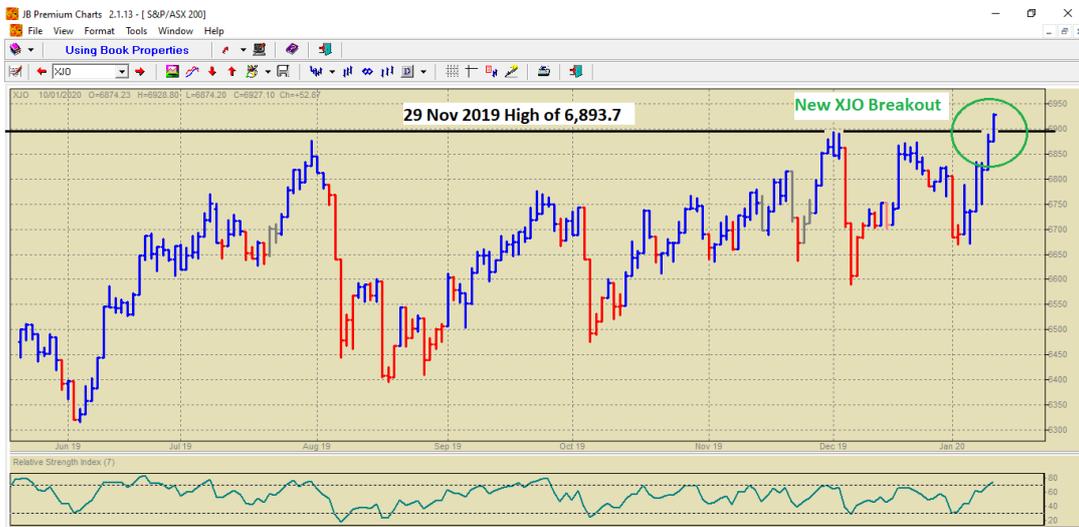


Your Free Wrap today contains extracts from Editions 753 & 754 of our weekly mentoring-style *'Investing & Online Trading'* Stock Market Report

Australia Breakout to a Record High!

By Jim Berg and John Atkinson

We are pleased to announce that the Australian market has now closed ABOVE all 3 Highs of 6,851.5, 6875.5 and 6,893.7, as set in *November 2007*, *July 2019* and *November 2019* respectively.



ASX200 (XJO) Index **Daily** Chart

On Friday 10th January 2020, the ASX200 (XJO) closed at a record High at **6929.0**, up **+2.9%** for the week.



ASX200 (XJO) Index **Weekly** Chart

In April 2019, the ASX200 Index (XJO) switched from a **falling trend** to a **rising trend** by Jim's definitions. Now, after months of consolidation and going basically sideways since July 2019, Friday's breakout to 'blue sky territory' may be regarded as a very positive sign.

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Most importantly from here, we would ideally like to see the XJO*:

- ✓ Remain above all 3 of these previous Highs
- ✓ Even better, to rally, retrace back to those Highs, then rebound – as this would indicate previous resistance becoming a new support level

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Jim's 'Live' \$100k Medium Term Investing Signals Portfolio Update

By John Atkinson and Jim Berg



Note: All data shown below *excludes transaction costs but includes Dividends* where applicable

1) Recap: Background to our 2 Notional Investing Portfolios

Commencing 28th December 2018 we have featured regular updates on the performance of our 2 new notional Investing Signals Portfolios.

Initially, we started with our 'Weekly Investing' Portfolio which we subsequently renamed our '**Medium Term Investing Signals Portfolio**', managed by Jim's traditional approach, I.e. mainly using **weekly charts**.

We commenced this notional Portfolio with the first 8 Medium Term Investing Entry Signals to have occurred in chronological order - as posted for Signals Members in early 2019. Then:

- ✓ Once this notional portfolio was 'full', another notional position was not added until at least one position was 'exited'
- ✓ We follow each notional position until it gives an Exit Signal, then post it on the 'Exit Log' and report the notional result for Signal Members' in the 'Master Log'.
- ✓ Replace it with the next Entry Signal to appear on the 'Signals Entry Log'

During 2019, we also added a Long Term Investing Portfolio, with those Signals managed using *monthly charts*. For each of these 2 notional Portfolios, we:

1. Aim to 'cut losses & let profits run' and expect that a few shares will outperform others
2. Split the notional \$100k into 8 x \$12.5k notional positions and manage each position using *weekly or monthly charts*, as applicable.

2) MEDIUM TERM Investing Signals Portfolio Performance Update

Jim Berg does not try to predict what will happen at any stage. Rather, his approach is to 'make hay while the sun shines', then react in response to price changes.

For instance, in late July/early August 2019, significant and unusual increased market volatility and uncertainty – caused by the August Reporting Season and the USA/China Trade War – began to result:

- A) In an increase in the number of notional trades being closed at a loss - compared with a few months before.
- B) Some larger draw-downs than usual in Jim's Medium Term Investing Signals

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Therefore, on the Open of Tuesday 6th August 2019 Jim 'closed' all open notional Trading and Medium Term Investing Signals positions, including his 'Live \$100k Medium Term Investing Signals Portfolio'.

(For comparison purposes, we continue to report daily to Signals Members on the progress of all the open Signals positions as at 5th August, until they give a traditional exit trigger.)

Market volatility returned to 'normal' on 1st November 2019 by Jims' definitions, so we notified Members of our [Trading, Investing and ETF Signals Services](#) and our weekly '[Investing & Online Trading Report](#)' that Jim had re-opened this '**Medium Term Investing**' Portfolio (and our other notional portfolios).

Interestingly, during November and December 2019 we added only 4 new notional Positions for 'Medium Term Investing' -- due to a lack of confirmed Entry Signals during that time.

Very significantly, Jim also rejected many other potential Signal trades to his 'Cutting Room Floor' for members interest only as they did not pass ALL of his 'Weight-of-Evidence' Rules, as taught in our weekly Report.

Table 1 shows the status of the 'open' and 'closed' notional positions in the **Medium Term Investing' Portfolio**, at the end of **December***:

						Total Returns (incl dividends) **	
Industry Group	Medium Term Investing Signal No.	Comments	Closing Price 31 Dec 2019	Purchased Price	Entry Date	%	Total Profits
Energy	53	Oil and gas exploration	\$2.51	\$2.41	5/11/2019	4.1%	\$ 519
Retailing	54	Footwear & apparel businesses	\$1.865	\$1.60	11/11/2019	16.6%	\$ 2,070
Banks	55	Mortgage Broking	\$2.73	\$2.59	13/12/2019	5.4%	\$ 676
Consumer Services	56	Restaurant operations.	\$8.91	\$9.37	20/12/2019	-4.9%	-\$ 614
	N/a	In cash' pending Jim's next new Entry Signal		\$0.00	N/a	-	-
	N/a	In cash' pending Jim's next new Entry Signal		\$0.00	N/a	-	-
	N/a	In cash' pending Jim's next new Entry Signal		\$0.00	N/a	-	-
	N/a	In cash' pending Jim's next new Entry Signal		\$0.00	N/a	-	-
Total Open Positions							\$ 2,651
4 Closed notional losses prior to 6 Aug 2019							-\$ 4,390
8 notional positions closed on 6 August 2019 on Trade War Cautionary Exit							\$ 22,888
Total NET** Open & Closed Notional Returns							\$ 21,149
						I.e	21.1%
							in 12 months

In particular, for this notional 'Medium Term Investing Portfolio' using mainly weekly charts*:

- 4 notional trades were closed BEFORE 6th August, totalling losses of **-\$4.9k**
- 8 notional Signals were closed ON 6 August 2019 at a **\$22.9k** notional profit.
- There were:
 - 4 notional positions 'open' with an open net profit of **+2.7k**
 - and 4 still in 'cash', pending Jim's next Entry Signals
- The total net 'open' and 'closed' notional Medium Term Investing returns were **+\$21.1k**, or **+21.1%** on a \$100k notional portfolio *in 12 months*.

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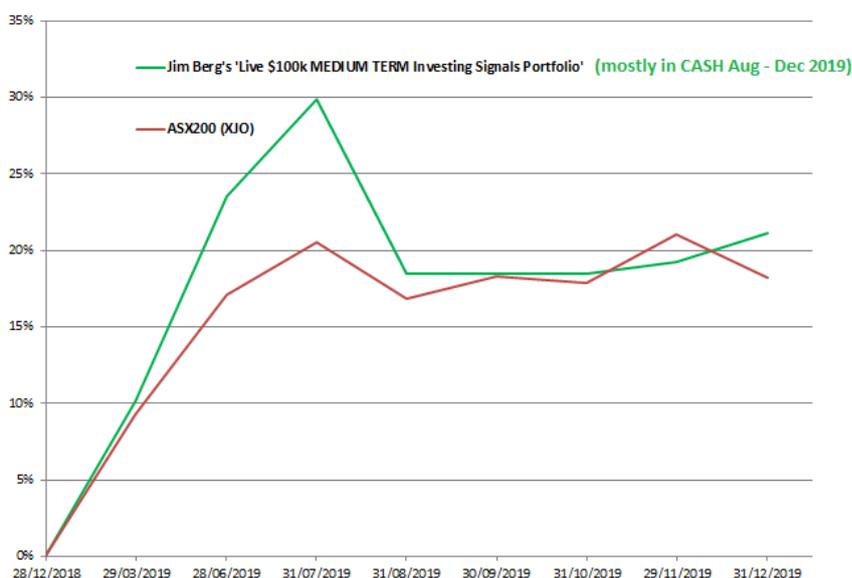
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Table 2 and Figure 1 compare the progressive performance for this notional Medium Term Investing Signals Portfolio vs the ASX200 (XJO) as at the end of **December 2019***:

Table 2 : Medium Term Investing Performance Comparison

ASX200 (XJO)	Increase	Date	Jim Berg's Medium Term 'Live \$100k Investing Signals Portfolio'	Increase	Outperformance: JB Medium Term \$100k Live Investing Signals Portfolio
5654.32	0%	28/12/2018	\$100,000	0%	0%
6180.73	9.3%	29/03/2019	\$110,173	10.2%	0.9%
6618.77	17.1%	28/06/2019	\$123,506	23.5%	6.4%
6812.6	20.5%	31/07/2019	\$129,871	29.9%	9.4%
6604.21	16.8%	31/08/2019	\$118,498	18.5%	1.7%
6688.35	18.3%	30/09/2019	\$118,498	18.5%	0.2%
6663.37	17.8%	31/10/2019	\$118,498	18.5%	0.7%
6846.00	21.1%	29/11/2019	\$119,266	19.3%	-1.8%
6684.08	18.2%	31/12/2019	\$121,149	21.1%	2.9%

Figure 1



In particular, this Table and Figure show*:

- Most of the growth occurred during the first half of the year, with the ASX200 wallowing sideways since July 2019.
- The fall in open profit after the peak on 31st July 2019. This was mainly due to the USA/China trade war rhetoric which saw many stock prices fall around the world.
- By the end of December 2019, at **+21.1%**, this open and closed value of Jim's notional 'Live' \$100k [Medium Term Investing Signals Portfolio](#) was at **+ 2.9%** more than the ASX200 (XJO) for the year.
- It is pertinent to observe that this outperformance was achieved while Jim's Portfolio:
 - ✓ Was **100% in Ca\$h for 3 months**. I.e. from 6 August to 5th November 2019 and
 - ✓ Had only 2 to 4 notional positions open between 5th Nov and 31st December 2019. I.e. **6 to 8 more positions were in Ca\$h during those 2 extra months**

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