THE MILLION DOLLAR QUESTION?

Should I Trade... or Invest?
This Guide is based on extracts from our weekly Mentoring-style ‘Investing & Online Trading’ Stock Report

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1) Are you feeling “dazed and confused?”

Welcome!

Are you a beginner looking to get started in the market?

Or, are you already experienced – so you’re looking how you can improve on your current results?

Stop searching – you are now in the right place……..

ASX speaker and author Jim Berg has traded and invested in the market for over 30 years - 18 years of which were as a professional advisor.

Since 2005, here at ShareTradingEducation.com, Jim has taught thousands of investors and traders how he trades and invests with his:

1. Common sense ‘Weight-of-Evidence’ approach and
2. Unique ‘JB Volatility Indicators’ which are now included in many charting programs, including MetaStock, the world’s leading technical analysis charting package, now in over 97 countries.

Are you feeling “dazed and confused” in the market right now? If so, then relax - as this Guide includes solutions to help you answer these 3 very important questions:

1. “Do you learn HOW to do it yourself – or have US do the Analysis for you?”
2. “ETFs OR Stocks/Shares?”
3. The Million Dollar Question: “Should I Trade short term, OR Invest longer term?”

As an update to original Edition of this Guide, we will also include what happened to our Signals results during the February 2018 ’mini-crash’.

Your financial independence is at the heart of everything we teach, so if you:

A. Have any queries or
B. Would like us to call you to discuss how we can best help you

then feel free to simply Contact Us =>

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2)  **Do you learn HOW to do it yourself....... OR do you have us do all the Analysis work for you?**

The answer to this question rests entirely with you, as it depends completely on your:

- Level of desire to be in control and to take responsibility for your own financial decisions
- Abilities and willingness to learn and use new software tools
- Availability to set aside the necessary time to learn, test and measure (NOTE: on paper first, before you put a single dollar in the market), then to apply your new skills

In essence, there are 2 **Educational Paths you can take with us** – either separately, or together:

**PATH #1: DIY**

Would you like to:

1. **Learn to do it yourself** – so you’ll have the confidence and skills to carry out all the analysis and decisions to trade and invest in the market?  **AND** at the same time

2. **Be able to follow a mentor** and his proven Investing/Trading Plan - to help you get and stay on track – and save you from reinventing the wheel?

If so, then consider our mentoring-style ‘**Investing and Online Trading Report**’ which we have published since July 2005. It contains:

- Many practical examples on how Jim Berg selects stocks, times his entries and exits, minimizes losses and optimizes profits
- Hands-on ‘**Learn-by-Doing**’ examples for you carry out and compare your results with Jim’s the following week.

When markets are in rising trends, our Report includes Jim’s weekly tracking of the ‘live’ progress of a selection of Australian shares and USA stocks in 2 notional portfolios, with trades lasting typically about 6 to 10 weeks - so you can follow first-hand how Jim:

- Selects **WHICH** shares to Buy,
- Times precisely **WHEN** to Buy and, more importantly,
- When to **SELL**

In our Report, we also include Jim’s weekly updates on his view of the market (and other views from regular contributors, e.g. Daryl Guppy, Alan Hull and Dr Alexander Elder).

Through this Report and the additional resources you will receive (including Jim’s own Investing & Trading Plan and his Watch Lists of Australian shares and USA stocks each week), our aim is for you become a confident trader or investor in **12 weeks**.

**Please note** that Jim’s principles for Stock Selection, Entry & Exit criteria, Money and Risk Management and Market Psychology remain the same, **regardless of the market you trade or invest in.**

That means you can adapt and apply Jim’s ‘**Weight-of-Evidence**’ approach from the examples which we show each week for USA & Australia - to other markets around the world.
{To gain the most benefit from what you will learn from our weekly ‘Investing & Online Trading’ Report, you will need one main ‘tool’ - a charting program with Jim’s JB Volatility Indicators built-in, such as Amibroker, Bullcharts, Market Analyst, Metastock and separate market price data.

Or, consider JB Premium Charts the program which Jim Berg and I both use and which includes your choice of 6 or 12 months Australian or USA data.}

**PATH #2: “DONE FOR YOU” SIGNALS**

For some Members, our weekly Report is sufficient education to help them learn and follow Jim Berg’s proven ‘Weight-of-Evidence’ approach.

Some supplement their income, while others have learnt to trade or invest for a living.

However, if you would:

- Like to follow more ‘live’ examples, e.g. to help fast track your learning experience
- Receive Entry AND Exit Signals on the day they occur, OR
- Prefer to have us make all the analysis decisions for you .......

then consider our 3 unique Australian Signals Services. These are like ‘Paint-by Numbers’, done for you Services.

Why? Because, on behalf of our Signals Members, we:

1. Scan the Australian market and notify them of any new confirmed Entry Signals
2. Provide entry criteria, including maximum recommended Entry Price, Initial Stop Loss value and associated Trade and Portfolio Risk criteria
3. Track each new notional trade entered and update prices, adjust stop loss types, update Stop loss prices and adjust Profit Targets, as applicable.
4. Monitor daily and weekly for any Exit Triggers --and notify Members accordingly.

We do not recommend intraday trading, so there is no need to be glued to a computer all day.

Rather, all Entry or Exit Signals are issued at the end of day or end of week, ready for the following day.

For more info. on our 3 Australian ‘Done for you’ Services, simply click on these links for:

1) Our ‘Super 10 ETF Portfolio’ Signals
2) Jim Berg’s Trading Signals and weekly Investing Signals for shares.
3) **ETFs or Stocks/ Shares?**

The main advantage of trading or investing in stocks or shares is that if you select ones which are in strong rising trends, then their short term and/or longer term returns may be greater than by investing in Exchange Traded Funds (ETFs).

On the flip side, shares/stocks tend to be more volatile, so be prepared that you may have to accept more - and sometimes larger losses in the process of achieving those potentially larger gains. (We teach how to manage individual Trade and Portfolio Losses as part of our Money & Risk Management education).

On the other hand, ETFs are NOT stock specific, as you are investing in a ‘basket’ of stocks or investing in an ETF which aims to track a whole Index of stocks. Consequently, ETFs tend have lower volatility generally*.

* However, please note that ETFs are still a financial product, so they are open to risks associated with market forces and unpredictable events which may affect their performance.

We will deal at length regarding stocks/shares in the remainder of this Guide, so for the rest of this section, we will discuss ETFs only.

Over a quarter of a million Australians now have ETFs in their portfolio. The increased liquidity and accessibility of ETFs is attracting investors of all ages - from Millennials, through Generation X to Baby Boomers.

There is currently an overwhelming total of over 250 ETFs to choose from in Australia alone! However, many may be in falling trends, so they may continue to fall in price. Others may be relatively illiquid.

The other challenge many new and experienced investors often face is that they do not know when to enter or exit a position.

Our new ‘**Super 10 ETF Portfolio**’ Signals Service is designed to help Australians invest in ETFs with confidence as it makes it much easier for Australian ETF Investors to tackle the 3 main problems of WHICH ETFs to buy, WHEN to buy and, more significantly, when to SELL.

We select 10 liquid ETFs from the Australian and global markets which are in rising trends. Each ETF may be purchased in a similar way to shares on local share trading platforms in Australia, so there is no need to open a separate overseas account, or to worry about exchange rates.

For each ETF, we suggest a maximum Buy Price and, most significantly, **no less than 5 structured Exit Strategies** should any individual ETF - or the whole notional portfolio - fall below pre-set levels.

On behalf of our ETF Signals members we monitor all 10 ETFs daily and provide weekly updates of prices, Stop Losses and summary status.

To help protect capital and profits, we then notify Members when any Exit Signals are generated, then scan the market to find a suitable replacement.

For example, in early February 2018, global markets experienced an unusual ‘mini crash’.

Dr Shane Oliver, AMP’s AMP Capital’s Head of Investment Strategy and Chief Economist, wrote in our [weekly Report](#) on 10th February 2018;

" ..From their recent highs to the lows share markets have fallen 12% in Japan .... 10% in the US, 8% in Europe, 13% in China and 5% in Australia... "

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In comparison, for our *Super 10 ETF Portfolio* Signals Service*, which comprises ETFs to represent markets from around the world:

- We progressively advised Members when 7 of the 10 ETFs triggered their Exit Signals.

- Those 7 ETFs were ‘exited’ the next day:
  - With an average notional loss of -$284 per $10,000 position (i.e.-2.8%) loss
  - While no one likes to experience losses emotionally, financially this equated to a -1.99% total closed loss on the overall $100,000 notional ETF portfolio - for all 7 exited positions combined.
  - This is significantly less than the 2% Portfolio Risk often quoted in many Money and Risk management books - for each single position.

Here at ShareTradingEducation.com, we regarded this as a positive result as it showed our new ETF Signals Service had “passed its first test” - under ‘mini-crash’ conditions.

*If global markets had continued to fall*, then the remaining 3 ETFs may have also triggered their Stops, in which case Members would have been advised to switch to cash for those 3 ETFs, as well as the first seven. If so, the bulk of their ‘nest eggs’ would have been in Ca$h and protected from any further downside, instead of holding on to a falling portfolio, with possible financial stress, loss of sleep and living ‘in hope’.

- In fact, global markets rebounded strongly, so this allowed us to issue new 7 replacement Entry Signals for our Members

- Just one month later, by 19th March 2018, all 10 ETFs, including the 7 replacements, were in open profit and their combined total open profit had completely offset the February losses.

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In Edition 652 of our weekly ‘Investing & Online Trading Report’ we published the following question received from a Member, with our reply:

**Q:** "A pat on the back for your ETF Signal Service - finding it very informative, easy to follow and great! If I am an Investor only, is there any reason I would not just do ETF investing instead of both shares and ETFs?"

**A:** "Overall, ETFs tend to be less volatile* than shares as they are not stock specific e.g. as they are intended to represent Funds or Indices. As such, do not expect such high returns as some shares.

However, if we can have a group of 10 ETFs, all gradually trending upwards:

- With minimal ‘churning’ - so we can have longer term positions with less exit triggers and less need to find replacements ( and, in turn, less transaction costs)

- Receive dividends (where applicable) and

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The Million Dollar Question Guide

✓ Target annual returns hopefully far greater than residential real estate and bank interest. (...... personally, I would conservatively like to see us achieve greater than 1% per month and preferably 1.5%**, i.e. about 12 to 18% pa* )

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then we trust our ETF Signals Members will be pleased with the new ‘Super 10 ETF Portfolio’ as an additional ‘string to their bow’ - to add to their current stock/share trading and investing results.”

Nobel for Economic Sciences winner Paul Samuelson once wrote;

"Investing should be more like watching paint dry or watching grass grow. If you want excitement, take $800 and go to Las Vegas"

The following is our response in Edition 652, to another question we also recently received:

Q: “How much of the cash allocation of a portfolio would you think would be prudent to invest in the ETF portfolio?“.

A: Please note that we are authorised to provide General Advice, i.e. not Specific Advice, so please consult with your financial Planner, accountant and /or financial advisor about your own personal circumstances.

In general, Jim suggests:

i) If a person wanted to use 2 accounts, then investors may consider 50% in ETFs AND 50% in shares.

ii) However, 100% is acceptable if ETFs are the only instrument they are investing in.

The combination of trading and investing and ETF systems using logical techniques that you teach have added significantly to my trading/investing journey.

Hello, John, Jim, and the team at Share Trading Education.

Thank you for the educational and trading services you produce.

The combination of trading and investing and ETF systems using logical techniques that you teach have added significantly to my trading / investing journey and you are always there to answer questions when I need more clarification.

I’m really loving your trading/investing and ETF Signals Services - they’re great!

Thank you

Jake Basger, Private Trader, Sydney, January 2018

Members of Jim’s combined Trading AND Investing Signals for Australian shares receive on-going Bonus Access to our Super 10 ETF Portfolio Signals. For more info, Click Here ➔
4) The “Million Dollar Question” – to Trade or Invest?

A question we often receive is;

“Should I trade short term, or invest longer term?”

First, we believe the answer to this is 3 fold, as it depends on:

1. "How is Your Lifestyle, timewise?"

- Do you have the time, motivation and peace of mind to come home in the evening, download end-of-day data, open your charts of interest and make your decisions to buy, hold or sell for the next day. Alternatively, to download our Trading Entry or Exit Signals? If so, short term trading using daily charts may suit you.

- Or, are you flat out busy every day AND evening with work and family commitments, with no time or energy left over to look at charts? If so, looking at weekly charts with an orange juice on a Sunday morning may suit you better.

2. "What is Your Personality?"

- Would you prefer to grab short term profits of, say 10 or 15% in about 1 to 3 months and be ready to close out quickly if the market turns and triggers your short term Stops in 1 to 2 days?

- Or, do you have the calmness to step back to a bigger picture and sit through daily ‘noise’ in order to "let your profits run"? If so, do you have the psyche to wait up to 1 to 2 weeks* before your longer term Stop is triggered?

(* Bear in mind that you do also have our Hard Stop and Emergency Stop, where applicable to take a daily exit if the market or share price makes a sudden drop ).

3. " What is the Market Doing? “

Over the last 12.5 years of publishing our ‘Investing & Online Trading’ Report, we have provided many examples in:

a. Bear markets: E.g. Jim Berg advised Report Members to switch to Ca$h in January 2008 and to stay in Ca$h for 18 months, until he issued a re-entry Signal in June 2009.

Those Members who followed Jim’s lead did NOT lose millions of dollars between them during the GFC.

They were also able to ADD to their previously locked in profits when the market rebounded.

This contrasted greatly with those Investors who followed many other advisors’ myth to ‘hold for the long term’ -- while markets around the world (and many portfolios) fell in the order of 50% or more, so they had to try to rebuild their wealth.

We are also aware that during Bear Markets, some Traders may take a few short term trades over a few days/weeks - like a rock rabbit foraging for food and quickly bringing the rewards back to his/her den.

b. Weak markets: E.g. during 2017, when ‘whiplashing’ can occur, such that short term stops may be triggered. A disciplined Trader may do the ‘right thing’ and exit, only to find the share price rebound soon after.
Meanwhile, an Investor may have found that he/she could ‘ride the storm’ by using weekly stops (which are set lower down) and thereby stay in their positions to take advantage of the continuation of the rising trend.

c) **Strong bull markets**: E.g. late 2005/early 2006 and late 2013 when short term trades achieved a high success rate **AND** longer term positions went on to achieve even larger notional profits.

We are all different, so each of us needs to resolve the Million Dollar question above, independently.

For those Members with the time, motivation, suitable personality/psyche and appropriate Money and Risk Management skills, **some may choose to do both**. E.g. for a Company they are interested in and which gives a confirmed Entry Signal using Jim’s Rules, they may choose to split their Capital in two parts and:

1. Open one position in a Trading account, manage it with daily charts, then aim to grab short term profits of up to 10 or 15% in, say, 1 to 3 months **AND**

2. Open a 2nd position in a separate Investing account and manage it with weekly charts so that after they have exited the first position, they still have this 2nd position in the same Company, with the aim of “…letting profits run”.

For the remainder of this Guide, we will focus more on this ‘Million Dollar Question – to trade or invest?’

In particular, we will provide commentary and details of some recent ACTUAL results from Jim’s Trading and Investing Signals Services for Australian shares, then summarise our thoughts in Section 7. As an Introduction, let’s first look at Jim’s aims and the Australian market in the last year.

5) **Jim Berg’s Aims and the Market in 2017**

5.1 **Overview of Jim Berg’s Aims**

Jim Berg does NOT encourage day trading or the use of leveraged products, such as CFDs, options, Forex, Futures, etc. - as potential losses can be magnified.

Rather, Jim’s systematic end-of-day trading and investing approach is designed for those who have ‘real jobs’ or are occupied in other activities.

Consequently, you can download stock/share price data and make your decisions to Buy, Hold or Sell AFTER the market has closed - i.e. so there is no need for you to be in front of a trading screen during the day.

Since 2005, Jim Berg and I teach how to select and how to manage their trades using Jim’s unique ‘**JB Volatility Indicators**’ and his common sense ‘**Weight-of-Evidence**’ strategies.

For our Report and Signals Members, our aims are:

A) **For short term trading** *

1) **Target** short term notional profits of about **10% to 15%** in about 1 to 2 months and to keep losses under 10% and preferably in the order of 5 to 7%

2) **Minimize losses** – to protect Initial Capital and profits

3) Aim for a **Profit: Loss Ratio** of at least **2:1**, i.e. overall notional profits at least twice the losses.

4) **Aim to achieve a success rate of greater than 50%** (preferably 65%+)

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B) For longer term investing

1) The Entry Criteria are usually the same as for trading

2) The positions are then managed using weekly charts, instead of daily charts

3) "Let notional profits run" (i.e. without short term profit taking)

Some Members may prefer:

A. To carry out Short term trading OR

B. To Invest longer term, while others may choose

C. To do BOTH

5.2 The Australian Market in 2017

The Australian market has underperformed the USA market in recent years. On 6th May 2017, in Edition 614 of our weekly mentoring-style ‘Investing & Online Trading’ Report, Jim Berg drew attention to a Key Reversal Signal in the ASX200 (XJO), so he announced his decision to exercise caution at that time and on Monday 8th May 2017:

1. Jim would exit all ‘open’ notional positions in:
   a) Our Report’s notional $100k short term trading Portfolio and
   b) Jim’s Trading & Investing Signals Services

2. Meanwhile, for those Signals Members who wished to stay in the market:
   a) We would continue to track the progress of all currently open shares after 8 May, until they give a traditional exit Signal – and show the comparative +/- results
   b) From 5th May until further notice, any new Entry Signals were primarily for Signals Members’ RESEARCH PURPOSES only and any Members who wished to continue trading and investing “...did so against the General Advice of the Proprietors.”

Looking back now, we can see that Jim’s call was very timely, as:

A. 6 out of 7 open Trading Signals at that time were closed on 8th May 2017 in notional profits i.e. an 85.7% success rate*, with only one loss, at -1.8%)

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B. The Australian market retraced during May and June 2017, then it

C. Tracked sideways between July and October 2017 - Daryl Guppy wrote in his own Newsletter and our Report at that time; “This is the longest period of choppy sideways market activity I have ever seen in more than 20 years of trading.”

For the benefit of those Signals Members who decided to continue trading between 5th May and 10th November 2017, Jim subsequently introduced some extra cautionary filters to tighten his search criteria in weak market conditions, which in turn reduced the number of Entry Signals.

In our weekly Report, we have detailed these and other more traditional selection criteria Jim uses to filter ‘Which Shares to Buy’.

6) Jim’s TRADING Signals Results: Nov. 2017 to Feb. 2018

In Edition 653 of our weekly Report we detailed how, in his Trading Signals Service, Jim had achieved*:

   a. **November 2017 to December 2017***:
      a. 9 profitable trades out of 10 (i.e. a **90% success rate**), with
      b. 5 of those 9 hitting or exceeding Jim’s 15% Profit Target
      c. One loss of **-13.0%** and 9 notional profits, averaging **+10.1%** in 11.5 weeks

   b. **January 2018***:
      a. 5 profitable trades out of 5 (i.e. a **100% success rate**), with
      b. 3 of the 5 hitting or exceeding Jim’s 15% Profit Target
      c. Notional profits ranging from **+10.1%** to **+18.3%** in an average of 4.3 weeks

Then February arrived, bringing with it:

   1) The ‘Mini-crash’ in global markets in the first week ([see page 5](#)) which in turn triggered 10 Stops
   2) A “V”-shaped recovery and associated ‘whipsawing’, just days later
   3) The February Reporting Season, with some added extreme volatility in some shares

Surprisingly, in Jim’s Trading Signals Service, it was one trade from the Reporting Season which presented the most extreme volatility, i.e. NOT the ‘mini-crash’.

Valuable projects take time. That’s why experienced Traders and Investors understand that “Rome wasn’t built in a day” I.e. Patience is necessary, along with the tenacity to take the good with the bad, in order to achieve overall success. As we stress regularly, the key is to keep the number and size losses as small as possible.

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**Figure 1:**

Trading Signal daily chart: 15% notional profit in 3.4 weeks

In Editions 657 and 658 of our weekly Report, we presented the results for closed notional trades for Jim’s Trading Signals in **February 2018***:

- **‘The Good’**: Charts and trading notes for 3 shares which achieved their notional Profit Targets (E.g. See Figure 1 above)
- **‘The Bad’**: A list of 9 others which were exited at relatively small losses of between -0.3% and -10.5%, during February’s unusual ‘mini-crash’.
- **‘The Ugly’**: One notional trade loss of -18.8%, the largest loss in 12 months. This was due to a significant drop in share price after the Company reported to the market during February’s Reporting Season. As a direct result, we have since added a new Rule to help prevent a re-occurrence in future Reporting Seasons.

In Edition 659 of our Report, a summary of all of Jim’s **closed Trading Signals** in the 4 months from Nov. 2017 to the end of Feb. 2018, including the impact of the Feb. global ‘mini-crash’, showed:

- **11** of Jim’s 29 notional trades (**i.e. 37.9%**) achieved **+15%** Profit Targets or better
- **3** achieved **+10%** notional profits or better
- **4** more were exited with profits of **+2.0** to **+6.2%**
- **8** were closed within Jim’s target trade loss maximum of **-10%** (**predominantly due to February’s mini-crash**), while **3** others exceeded it (**-10.5%, -13.0% and -18.8%**)

For a notional $100k portfolio, the overall total **NET** notional profit was **$17,047**, with each notional trade averaging **+4.7% (after losses)** in 8.3 weeks.

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Table 1 below shows the average profit and losses for these 29 notional trades:

<table>
<thead>
<tr>
<th></th>
<th>Average Profit per $12.5k notional trade</th>
<th>Average Loss per $12.5k notional trade</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$1,510 i.e. 12.1% for 18 trades</td>
<td>-$921 i.e. -7.4% for 11 trades</td>
</tr>
</tbody>
</table>

In particular, note that:

A. The average **size AND** the total **number** of profits exceeded the size and number of losses

B. By controlling most of the losses below Jim’s target limit of -10%, the mean loss for 11 notional trades was only **-7.4%**, even though this included the single **-18.8%** on one trade.

Table 2 above shows:

- The overall success rate of **62.1% exceeded** Jim’s minimum target of 50% and was just less than his preferred target in stronger markets of 65%
- The overall Profit-Loss Ratio of **2.68 to 1 exceeded** Jim’s target of 2:1
- The use of Jim’s current additional filtering criteria, as detailed in our series of ‘Cutting Room Floor’ articles in our weekly Report, has helped to optimise trade selection for Jim’s Trading Signals Service.
- The overall total net notional Profit, after we included the unusual losses experienced during the February ‘mini-crash’ and Reporting Season, was **+$17,047** on a notional $100k portfolio.

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**7) Jim’s Recent INVESTING Signals Results**

In the previous section 6j) above, we looked at Jim Berg’s recently closed Trading Signals results. These were monitored and managed by us on behalf of our Signals Members using **daily** charts, after the market closed.

Let’s now look at Jim’s recently closed (and currently open) Investing Signals, which we manage mainly using **weekly** charts and update for our Members each weekend.
First, as background: The technical Entry criteria for Investing Signals are predominantly the same as for his Trading Signals.

However to qualify, they must also pass Jim’s Fundamental criteria, so the shares MUST:

- Be fundamentally sound
- Be in a rising trend and
- Pass all of Jim’s entry criteria

before they can meet ALL of Jim’s ‘Weight-of-Evidence’ entry criteria and thereby provide a confirmed Entry Signal.

We then monitor each notional Investing position on behalf of our Investing Signals Members daily AND each weekend – in case one of the 5 Exit Triggers we have in place is triggered.

In the period between Jim’s warning in May 2017 and lifting of his Caution on 10th November 2017 (see 5.2 above), for those Members who wished to continue investing or to watch the Signals progress, Jim added extra filtering criteria to facilitate and optimize his Signals selection in weak markets.

Subsequently, between 1st November 2017 and 5th February 2018, there was only one Exit Signal for Jim’s Investing Signals Service, which resulted in a +26.2% notional Profit.

Then the February 2018 ‘Mini-crash’ and Reporting Season arrived and, similar to the Trading Signals in 6) above, several stops were triggered that month.

This included an Exit Signal on a notional Investing position which had been ‘entered’ in July 2016 and was exited 1.6 years later in February 2018 for a notional +112.8% Profit (for those who remained in the market after Jim’s May 2017 warning), as shown in Figure 2 below*:

* The past performance of ShareTradingEducation.com (“STE”) products shown here is not and should not be taken as an indication of future performance. Caution should be exercised in assessing past performance. STE’s service, like all other financial services, is subject to market forces and unpredictable events that may adversely affect its future performance. Please seek independent financial advice before you decide if this is appropriate for you.
Table 3 shows the summary of closed notional Investing Signal positions in recent months, most of which were exited in February 2018, under unusual ‘mini-crash’ conditions*.

This Table includes the ‘best’ at a **+112.8%** notional profit (see Figure 2 above) and the ‘worst’ – a notional trade loss of **-18.8%**, the largest in 12 months*. (As discussed in 6) above, we have since added a new Rule to help prevent a re-occurrence in future Reporting Seasons.}

Table 3 above* also shows:

- Even though the market was subjected to ‘mini-crash’ conditions, Jim’s proven Stops managed to contain most (7 out of 9) losses to under 10%.
- The overall total NET notional Profit for the 15 closed notional trades was **+$34,925**

In addition, as at the Close of Friday 9th March 2018 in Jim's Investing Signals Service*:

- There were 16 OPEN Investing positions
- ALL of which were showing open notional profits, as shown in Table 4 below:

* The past performance of ShareTradingEducation.com (“STE”) products shown here is not and should not be taken as an indication of future performance. Caution should be exercised in assessing past performance. STE’s service, like all other financial services, is subject to market forces and unpredictable events that may adversely affect its future performance. Please seek independent financial advice before you decide if this is appropriate for you.
8) More on the Million Dollar Question—to Trade or Invest?

On Page 8, we wrote; “A question we often receive is; “Should I trade short term, or invest longer term?”

We explained that we believe the answer to this is 3 fold, as it depends on:

1. How is Your lifestyle, timewise?
2. What is your personality?
3. What is the market doing?”

Some more thoughts on item 1:

A) Maybe you are motivated to use trading as your own business – aiming to supplement your income and improve your lifestyle, then ultimately, to develop your skills and capital to trade for a living?

If so, then consider use Jim Berg’s Trading System (including his now world famous JB Volatility Indicators) to trade short term – with the aim of targeting short term profits in the order of 10 to 15% in non-speculative shares in about 1 to 3 months

B) Or maybe your goal is to invest longer term and build for your retirement?

If so, then consider using Jim’s JB Volatility Indicators and his common sense ‘Weight-of-Evidence‘ approach of combining fundamental and technical analysis to help you:

✓ Select fundamentally sound shares in rising trends to invest in and
✓ Use Jim’s weekly charts to manage your positions, trim losses and ‘let profits run’

C) Or you may prefer to invest the bulk of your capital for later AND, at the same time, set some part of your nest egg in a trading account for short term extra income?

This solution of combining BOTH time frames provides 2 main advantages:

1. If a position is exited at a short term profit, then continues upwards for weeks or months, then you can still be invested in it in your investing account.

2. Of far greater importance, is that sometimes Trading using daily charts is more profitable and at other times (as displayed in May to Dec 2017) Investing using Weekly charts wins out.

By using BOTH time frames, as a combined Investor and Trader you have the opportunity to be involved in both, rather than one and to monitor ‘real time’ your own comparative overall performance.

We trust that this Guide has helped you answer these 3 key questions:

1. “Do you learn HOW to do it yourself – or have US do all the analysis for you?”
2. “ETFs OR Stocks/Shares?”
3. The Million Dollar Question: “Should I Trade short term, OR Invest longer term?”
Your financial independence is at the heart of everything we teach, so if:

A. You have any queries or if

B. You would like us to call you to discuss how we can best help you

then feel free to simply **Contact Us ==>**

In closing, if you are currently looking around for someone you can trust for mentoring support – to help you learn how to confidently trade and invest in the market – then we believe there are **2 key questions you need to ask:**

**Q1)** Do they provide you with:

a. One comprehensive rule based system AND

b. A Trading/Investing Plan you can use to successfully trade & invest the market?

This is very important. Why?

Because you will find many others give you simple background education, teach you general info – much of which you can pick up for free online anyway - then leave you to create, test and measure your own Plan .......and sink or swim.

**Q2)** Do they also show you how to trade/invest their Plan and, very importantly, do they publish the results?

*We do......*

*For your next step, on the next 5 pages you will find a selection of some of our main educational resources (available individually or packaged)- all aimed to help you begin safely and wisely in the market, or to improve your current performance.*

We wish you a highly successful and profitable year ahead and may you trade and invest with Jim Berg’s ‘*Weight-of-Evidence*’.

John Atkinson
Editor, with Jim Berg, of the mentoring-style
‘Investing & Online Trading’ Report since 2005

March 2018
“Which Way From Here?”

"It would normally take a few years of research & back-testing to build a trading system and then have confidence to apply in the market."

Since 1989, I've been learning continually; trading and trading - and really enjoyed Jim's presentation last night.

I thought it was also great for new people who came along as it rendered down - the mass of information and techniques that is/are out there - to a trading system that effectively uses the ‘Weight-of-Evidence’ to determine when to trade/invest or not to trade/invest.

It would normally take a few years of research & back-testing to build a trading system and then have confidence to apply in the market.

This is very important for people new to trading/investing. They should not just throw money at the market.”

Alexander Josephs, Private Trader, Brisbane ATAA and Seminar Attendee, March 2014

Information on its own will NOT change your life. You can Google any topic you like and often find some fairly reliable information. To make a difference, Implementation is the key.

It's what YOU DO with what you learn which makes Expert Jim Berg’s trading and investing education so VALUABLE.

Our focus is to help you implement and get it done, step-by-step, based on Jim’s Volatility Indicators and common sense 'Weight-of-Evidence’ approach. To continue your journey with us, simply click the links below now to find out more about our:

A) OUR 2 MAIN CORE SERVICES

PATH #1 DIY: Learn How to Trade and Invest Yourself

with our weekly mentoring-style ‘Investing & Online Trading’ Report, which includes:

a) Jim’s latest Watch Lists for the USA and Australian markets

b) Practical tutorials on how to filter ‘experts picks’ - to help you find WHICH shares to buy & compare your analysis with Jim’s

c) Notional portfolios for the current USA and Australian Markets – to help you learn WHEN to Buy and, more importantly, when to SELL

d) Money & Risk Management & trading/investing psychology

e) Jim’s and others’ view of the market – so you’ll know when Jim recommends to be in the market and when to be in Cash

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"Many years of benefit and satisfaction"

"I have benefitted greatly from the wealth of information and for the education I have received from Jim's system and your weekly Report over many years.

I have found Jim's system to be brilliant and as long as I followed 'the rules' rigidly it's provided many years of benefit and satisfaction.

I will remain grateful for having discovered your web site and for the education I have received over the years.

Thank you for the persistent hard work that has gone into making this web site so successful and helpful."

Stephen Crew, private trader, Perth, WA, December 2016

"...continues to give me consistently profitable trading results"

I have been a subscriber to the 'Investing & Online Trading' stock market Report for a long time and truly believe the Berg method is one of the best around.

It is a rule based method, with the philosophy to restrict losses and let profits run, which continues to give me consistently profitable trading results.

The report is an excellent publication and I would recommend it to anyone interested in the share market, especially newcomers."

Bill Langford, Private Trader, Kenmore, QLD Feb 2017

Click on these links to:

1. Find out all about what you will receive and how the Report can help you
2. Order this week's latest Edition or for Jim's Ultimate $1 Trial of this Report
3. Become a Member now, with no lock-in contract
**PATH #2: Do you want US do the Analysis for you?**

If so, then we invite you to check out our 3 Australian Signals Services, which operate like ‘Paint-by-numbers’ - to help you learn how to trade and invest in the Australian market:

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"...logical techniques that you teach have added significantly to my trading/investing journey."

Hello, John, Jim, and the team at Share Trading Education.
Thank you for the educational and trading services you produce.
The combination of trading and Investing and ETF systems using logical techniques that you teach have added significantly to my trading / investing journey and you are always there to answer questions when I need more clarification.
I'm really loving your trading/investing and ETF Signals Services - they're great!
Thank you
Jake Basger, Private Trader, Sydney, January 2018
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To find out more about these 3 ‘done for you’ Services for the Australian share and Exchange Traded Funds (ETF) markets, click on these links now for:

1) Jim Berg’s [Trading Signals](#) for shares
2) Jim’s [weekly Investing Signals](#) for shares
3) Our [‘Super 10 ETF Portfolio’ Signals Service](#)
B) PACKAGES

The main tools which Jim Berg uses are his now world famous JB Volatility Indicators -- to help him select:

1. WHICH shares and ETFs to Buy, then
2. WHEN to Buy and more importantly,
3. When to SELL.

Jim’s Indicators are installed on many charting programs around the world, including Amibroker, Bullcharts, IC Investor, Market Analyst and now the benchmark, MetaStock too.

They are also included (along with price data and history data) in JB Premium Charts, the charting program which Jim and John use every day.

In A) above we explained our 2 core services are our weekly ‘Investing & Online Trading’ Report for the Australian, USA and other markets and our 3 Australian Signals Services.

The following 2 packages therefore INCLUDE JB Premium Charts and 6 months of your choice of USA or Australian stock/share price data:

1) MasterClass Package

"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) Webinar 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.

Sincerely, Donald Swain, Private Investor, Melbourne, September 2017

Your MasterClass package includes:

- 3 months of the ‘Investing & Online Trading’ Report
- Jim Berg’s 12 weekly E-classes
- 6 months JB Premium Charts and data
- 1 month email support
- And more

For full details, Click Here ➔
2) Platinum Membership

This new Platinum Membership Includes:

- As for the MasterClass above
- **PLUS** 3 months of our 3 Signals Services for Australian shares and ETFs
- And more

For full details, [Click Here Now ➤](#)

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*A former District Court Judge & Order of Australia Member writes:*

"Jim, delighted to see you featuring in the latest ASX newsletter.

The information I get from your weekly reports and yearly training sessions provides the basic rules for me in everything I have done in the stock market for many years now.

I had been with a number of educators before finding you and John, but in every case, much of what they taught simply did not ring true and was sometimes even illogical.

From the moment I came across you and your methods, everything clicked into place. I couldn't survive without your help. It is invaluable.

I greatly admire the way you fine tune the system as the market shifts ground and constantly bless the day I found you. I would have given up ages ago if it was not for your guidance.

My profound thanks to you both"

Learn How to Confidently Trade & Invest in 12 WEEKS
With Help from Expert Trader
Jim Berg

With Jim Berg’s Platinum Membership program

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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.

As this information is of a general nature only, you should seek advice from your broker or other investment advisors as appropriate before taking any action. In particular, this may include consultation with your Taxation Advisor regarding any possible taxation implications from selling stocks, shares, Exchange Traded Funds (ETFs) or other instruments. (ShareTradingEducation.com™. P/L is not a registered tax agent and any reference to tax is incidental and must be confirmed with a registered tax agent. The decision to trade and the method of trading is for the reader to decide.

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