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Your Free Wrap today is based on an  
extract from Edition 613 of our weekly

Mentoring-style 'Investing &amp; Online Trading' Stock Report



## 71.4% Success Rate in April

By John Atkinson

### 1. Background

#### A) Hands on 'Learn-by Doing' Report

In our weekly mentoring-style '[Investing & Online Trading Report](#)' we teach Members how to use Jim Berg's profitable strategies and unique JB Volatility Indicators to trade stock and share markets of the world.

Each week we include:

- ✓ **Jim's own watch lists for the USA stock and Australian share markets:**

These feature those stocks and shares which have passed most of Jim's proven 'Weight-of-Evidence' rules, so that Report Members can watch them over the next 1-2 weeks and check if the final entry rules are triggered

- ✓ **Two notional short term trading portfolios for the USA & Australian markets**

By following Jim's notional trades 'from cradle to grave' over a month or two, these portfolio examples help our Report Members to

- ✓ Build their market skills and confidence and
- ✓ Understand precisely WHEN to Buy and, more importantly, when to SELL.

#### B) Jim Berg's Trading and Investing Signals

Also, for Australian investors and traders only, we offer Jim's [Australian Signals Services](#).

Every night, after the market has closed, expert trader and investor Jim Berg and his team scan the Australian share market for potential Trading and Investing Entry Signals on behalf of our Signals Members, ready for the following day.

These shares need to pass all of Jim's documented 'Weight-of-Evidence' Rules before they are posted as confirmed Entry Signals.

The latest prices and stop loss values are also updated in a Master Log of all 'open' trading 'positions' in the Australian share market, so that Signals Members can watch the management 'real time' of all 'open' Signals.

Each night we then send our Signals Members the results of our comprehensive analysis - in the form of

1. An **Entry Log** - showing any new **Entry Signals**, along with suggested Maximum Buy Prices, Initial Stop Loss values, example position sizing, Money & Risk Management factors etc. - ready for the next day
2. An **Exit Log** - showing any new **Exit Signals** for the next day
3. A **Master Log** - showing, for all Signals, the latest closing prices, open profits/losses, stop loss types, stop loss values, suggested trading profit target values, dividends, etc.

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It is NOT possible for all investing or trading positions to be consistently profitable. *There will always be losses* - so Jim Berg teaches the importance of:

- 1) Determine exactly the price where you will exit if the trade goes against you..... **BEFORE** you enter any new position.
- 2) Calculate the corresponding trade risk and portfolio risk and ensure they are within Jim's/your limits
- 3) **To be consistently profitable overall**, here are 2 Key Performance Indicators to aim for:
  - a. **A Success Rate of 50%+**, i.e. at least half your trades are profitable.  
(With experience and good market conditions, increase this goal to 65%, with Daryl Guppy saying that the top of the flagpole is at about 80% profitable).
  - b. **A Profit- Loss Ratio of 2: 1** i.e. the size of your profits are TWICE the size of your losses.

Jim Berg's notional trades in his Australian [Trading Signals](#) Service and in his USA and Australian portfolios in his [weekly mentoring-style Report](#):

- ✓ Are all managed using *end-of-day charts* - there is no need to sit in front of a screen during the day, *so you can get on living during the day*
- ✓ Jim Berg aims to:
  1. Minimise losses to under 10% (preferably closer to 2-5%) and to
  2. Target short term profits of about 10 to 15% in about 1 to 2 months.

In his Australian [Investing Signals](#) Service, positions are mainly monitored using *weekly charts* and Jim's aim is to minimise losses (as shown above) and to *'let profits run'*.

With this in mind, let's now look at last month's Signals performance:

## 2. April Signals Performance#

### A) Trading Signals

- ✚ As at Friday 28<sup>th</sup> April, most open Trading Signals are ticking upwards positively on low volatility, which in turn means:
  - ✓ On behalf of our Signals Members, we are switching Stops from Initial to Adjusted or Trailing Stops when conditions warrant, as per Jim's rules
  - ✓ We also ratchet up Trailing Stops progressively - to protect open profits
- ✚ 7 other Trading Signals were stopped out or hit their Profit Targets in April of which:
  - a. Only **2** were exited at a Loss: at **-5.7%** & **-9.9%**  
(i.e. both within Jim's 10% limit).
  - b. The other **5** were exited at Profits of **+ 2.6%**, **+5.5%**, **+14.7%**, **+15.0%** and **+16.4%**
  - c. , The average length of trade was 6.2 weeks  
(i.e. within Jim's 1-2 months target).

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- ✚ Assuming notional position sizes of \$12,500 each, then for these 7 April exits, the:
  - ❖ Total closed notional profits\* = **+\$6,757**
  - ❖ Total closed notional losses\* = **-\$1,950**
  - + \$4,807 net profit\***

(\*Excluding transaction costs and dividends received )

✚ Summarising these 7 closed trades in April:

- 1) This equates to an April closed **Profit-Loss Ratio of 3.5: 1**  
- which exceeds Jim's target of 2:1 above
- 2) There were 5 profitable vs 2 losing trades. I.e. a **success rate of 71.4%**,  
which also exceeds Jim Berg's target of 50%- 65% above.

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## 2) Investing Signals in April

As mentioned above, the use of weekly charts to manage positions allows Investing Signals "profits to run", without short term profit taking.

For Jim Berg's Australian Investing Signals, as at Friday 28<sup>th</sup> April 2017:

✚ Most open Investing Signals are ticking upwards positively on low volatility, which in turn means:

- ✓ On behalf of our Signals Members, we switch Stops from weekly Initial to weekly Trailing Stops when conditions warrant, as per Jim's rules
- ✓ Weekly Trailing Stops are also being progressively ratcheted up to protect open profits
- ✓ There were **NO Exit Signals** for any open Investing positions in April
- ✓ There were 26 Open notional Investing positions, of which:
  - a) Only 1 is showing an open Loss (of **-8.5%** i.e. within Jim's 10% limit)
  - b) The remaining 25 (i.e. **96.2%**) are all in open profit, of which:
    - ✓ **10** positions are up to **+10 %**
    - ✓ **12** positions are in open profit of **+10 %** to **+30%** and
    - ✓ **3** positions in open profit of **+30%** to **+61%**

As we move into May, Jim and his team continue to scan the markets on behalf of Members:

- 1) **Each night** for new Entry and Exit Signals in his Australian [Trading Signals](#) and [Investing Signals](#) Services **AND**
- 2) **Each weekend** to create his published Watch Lists and entry/exit triggers for Jim's notional USA and Australian portfolios in his weekly '[Investing & Online Trading](#)' Report.

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