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Your Free Wrap today is based on an extract from Edition 619 of our weekly

Mentoring-style 'Investing & Online Trading' Stock Report



Comparison

By Jim Berg and John Atkinson

1) Since Jim Switched to Ca\$h

5 weeks ago, in Edition 614 of our '[Investing & Online Trading](#)' Report, Jim revealed his reasons for concern for the Australian market at that time and issued his '**Exercise Caution and Take Profits**' announcement.

Those [Trading and Investing Signals](#) and Report Members who decided to follow Jim's lead - and switch to Ca\$h - were able to exit on Monday 8th May.

For those who chose not to exit, we also said we would ".....continue to track the progress of all currently open shares after 8th May, until they give a traditional exit Signal - and show the comparative +/- results."



Since Jim's timely announcements on the weekend of 6th May 2017, the overall market has fallen, as shown in this chart of the **ASX200 (XJO)** Index



This chart of the S&P / ASX200 **Financials - x-A-REIT Sector (XXJ)** clearly shows a number of closes below a falling moving average.

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In both Jim's [Trading Signals](#) and [Investing Signals](#) services, most of the other shares which were open as at 8th May also fell during May, although to date conventional stops have not been triggered - so many notional trades are still 'open'.

For those who did not exit the market on 8th May, Investing Signal **NIB Holdings (NHF)** was exited on 31st May, after it closed below the Emergency Stop the night before.

This Company had given 2 entry Signals originally (14th November and 22nd December 2016), so both notional trades were exited on 31st May after this Emergency Stop trigger, as shown in the 2 charts below

1. Investing Signal NHF – Entry 14th November 2016



NIB Holdings (NHF) Weekly Chart

1. **JB Caution Take Profits Exit** on 8/5/2017 at a **+29.0%** notional profit
2. **For those still in market** : Close below daily **Emergency Stop**. Exit following day on 31/5/17 at a **+7.5%** profit
3. *Before and After*' difference: **-21.5%** or **\$2,682** less profit on a \$12,500 notional position

2. Investing Signal NHF – Entry 22nd December 2016



NIB Holdings (NHF) Weekly Chart

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1. **JB Caution Take Profits Exit** on 8/5/2017 at a **+28.7%** notional profit
2. **For those still in market:** Close below daily **Emergency Stop**. Exit following day on 31/5/17 at a **+7.3%** profit
3. *Before and After'* difference: **-21.4%** or **\$2,677** less profit on a \$12,500 notional position

Tables 1 and 2 below provide the updated summaries of all the '*Before and After*' results for the 10 notional trades from Jim's [Trading Signals](#) and [Investing Signals](#) Services which have triggered conventional exits since 8th May so far:

TABLE 1: TRADING SIGNALS (Using Daily Charts)

Ticker Code	Description	Entry Date	Entry Price	JB Caution: Take Profits Exit		Conventional Exit				"Before vs After" Results	
				Exit Price 8th May	8th May Result	Trigger	Exit Date	Exit Price	Conventional Result	% Difference	\$\$ Difference
ASL	Ausdrill	22/03/2017	\$1.41	\$1.385	-1.8%	Trailing Stop	17/05/2017	\$1.305	-7.4%	-5.7%	-\$ 709.2
NUF	Nufarm	16/02/2017	\$9.29	\$10.060	8.3%	Trailing Stop	16/05/2017	\$9.99	7.5%	-0.8%	-\$ 94.2
				MEAN	3.26%			MEAN	0.04%	-3.2%	-\$ 803.4

TABLE 2: INVESTING SIGNALS (Using Weekly Charts)

Ticker Code	Description	Entry Date	Entry Price	JB Caution: Take Profits Exit		Conventional Exit				"Before vs After" Results	
				Exit Price 8th May	8th May Result	Weekly Charts Trigger	Exit Date	Exit Price	Conventional Result	% Difference	\$\$ Difference
NHF	NIB Holdings	22/12/2016	\$4.81	\$6.19	28.7%	Emergency Stop	31/05/2017	\$5.16	7.3%	-21.4%	-\$ 2,676.7
NHF	NIB Holdings	14/11/2016	\$4.80	\$6.19	29.0%	Emergency Stop	31/05/2017	\$5.16	7.5%	-21.5%	-\$ 2,682.3
CBA	Commonwealth Bank	14/02/2017	\$83.20	\$85.32	2.5%	Trailing Stop	22/05/2017	\$80.90	-2.8%	-5.3%	-\$ 664.1
SXL	Sth. Cross Media	16/12/2016	\$1.41	\$1.42	0.4%	Initial Stop	22/05/2017	\$1.21	-14.5%	-14.9%	-\$ 1,861.7
CSR	CSR Ltd	24/01/2017	\$4.47	\$5.05	13.0%	Emergency Stop	19/05/2017	\$4.20	-6.0%	-19.0%	-\$ 2,377.0
PGH	Pact Group Holdings	13/03/2017	\$6.89	\$6.32	-8.3%	Emergency Stop	10/05/2017	\$6.30	-8.6%	-0.3%	-\$ 36.3
PGH	" "	23/11/2016	\$6.19	\$6.32	2.1%	Emergency Stop	10/05/2017	\$6.30	1.8%	-0.3%	-\$ 40.4
PGH	" "	9/08/2016	\$5.91	\$6.32	6.9%	Emergency Stop	10/05/2017	\$6.30	6.6%	-0.3%	-\$ 42.3
				MEAN	9.3%			MEAN	-1.1%	-10.4%	-\$ 1,297.6

For those closed trades, taking an exit on 8th May (*rather than waiting for a conventional exit*) would have yielded for notional \$12,500 positions in a \$100k notional portfolio*:

- A) **2 Trading** notional trades: An average of **+3.2%** or **+\$803** more profit* / trade
- B) **8 Investing** notional trades: An average of **+10.4%** or **+\$1,298** more profit* / trade

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2) Coming Up

Traditionally there is often a period of '*tax loss selling*' towards the end of the financial year by private and institutional investors/traders. This is often followed by a July Rally. We achieved a **90% success rate** in July 2016, with 9 out of 10 [Trading Signals](#) in closed notional profit*.

In coming weeks we again plan to put together a Watch List of potential trades so that, if the market continues up from here and rallies in July, then we will take advantage of that rise.

In our weekly '[Investing & Online Trading](#)' Report:

- 1) We will continue to track the progress of all the other Signal trades which were open when Jim made his '*Take Profits*' announcement on 6th May and will publish updates in coming weeks.
- 2) Each week, Jim will also:
 - a. Provide his latest view of the USA and Australian Markets -- including if/when to **switch back from Ca\$h** - and re-enter the Australian market

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- b. Publish his 'JB Alerts' Watch Lists of USA and Australian shares which meet most of Jim's entry criteria – so [Report Members](#) can track them the next week to see which ones give confirmed final entry signals by Jim's proven 'Weight-of-Evidence' rules, developed over more than 30 years
- c. More education on Jim's profitable and trading strategies

3) New! ETFs Waiting List

In last week's Edition 618 of our '[Investing & Online Trading](#)' Report, we also announced;

"... **in addition to SHARES**, Jim now also intends to **ADD** a number of **ETFs** as part of his daily Trading and Signals Service, selected and monitored in the same way. This will allow traders and investors to:

1. **Diversify their portfolios**, while at the same time helping to reduce some stock specific risk
2. Help investors to **potentially increase their total returns** - by the addition of Franking Credits and Dividends where applicable
3. **Take advantage of rising trends in Indices** which may be outperforming the Australian market, e.g. as has occurred in the USA and some developing markets in recent years.

Also, it will allow them:

- a) To keep trading or investing here in Australia in overseas markets **without exchange rate concerns** and
- b) During times **when Jim announces a 'no go'** period for the Australian market

Right now, Jim is:

- 1) Looking daily for confirmed 'Weight-of-Evidence' Entry signals into an Initial Watch list of ETFs which are in rising trends in Australia and USA
- 2) Planning to filter the ETF market to add other ETFs to his ETF Watch List progressively in time. This may include Asian/European developing markets, commodities, etc.
- 3) And is also planning to add other ETFs which are purposely designed to help traders make money in falling markets – so that he is prepared if/when the market switches to a falling trend.

If you would like us to email you *as soon as the first ETF on Jim's Watch List* triggers an ETF Entry Signal (*for rising or falling markets*) in his [Signals Services](#), then email us now at Info@ShareTradingEducation.com and in the subject line, simply write **'WAITING LIST.....'**

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