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extract from Edition 624 of our weekly

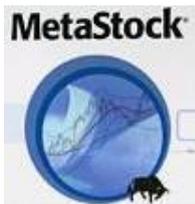
Mentoring-style 'Investing & Online Trading' Stock Report



TOOLS OF TRADE

1. MetaStock & JB Premium Data Update

By John Atkinson



First, some historical background: Before Jim Berg joined us here at ShareTradingEducation.com in 2005, Jim used to be the Lead Educator for MetaStock, one of the most popular charting programs in the world.

It's a very powerful program, with many indicators, a search facility called the "Explorer", 'Expert advisers' (templates that generate buy and sell signals on your charts based on the expert advisor); the ability to write notes on your charts, to program your own formulae into indicators and searches - and more.

As Lead Educator, Jim used to receive many questions on how to use Metastock. Later, Jim designed JB Premium Charts as a much simpler charting program to suit his needs. Many of our Members have also since benefitted from its ease of use.

All of Jim's (and most of my) charts in our weekly '*Investing & Online Trading Report*' are now plotted using [JB Premium Charts](#) package (which, unlike many other charting programs, also includes your choice of 6 or 12 months [JB Premium Data](#)).

In addition to JB Premium Charts for his actual charting, Jim also uses:

- 1) Metastock for his *Technical Analysis searches* to create his RSI Alerts Watch Lists for USA and Australia which we publish in this Report each week and also daily for his [Australian Signals Services](#)
- 2) [Oraclescan](#) for Jim's *Fundamental Analysis* searches - for his personal SMSF account and his [Investing Signals Service](#)



With far fewer '*bells and whistles*', than Metastock, we have found that Members can easily use [JB Premium Charts](#) – as evidenced by the fact that is *now very rare* for us to receive any queries on how to install or use it.

Originally, up to Version 11, Metastock could be 'fed' with data of your choice - provided it was in '*Metastock format*'.

That changed in Versions 12 to 14 when it became compulsory to source data from Thomas Reuters in USA and MetaStock could only be used in online mode.

It could not be used offline with local data, as was possible originally with Versions 11 and prior. For use in Australia these versions were very slow to use.

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After a lot of complaints about this, the good news is that since November 2016, the latest version 15 now allows for local data and offline use again. I understand there have been some improvements compared to versions 12 to 14 and recently, some early 'bugs' have been also fixed.

I upgraded my old version of Metastock recently and to be frank I failed the IQ test in being able to install V15 myself. After pulling out too much hair (and its limited at my age!), I was very grateful to be able to call and accept the help that had been offered by Craig, the supplier, to be able to lead me through what I considered were illogical steps.

Having said that, once he'd helped me install V15, (touch wood) I've been able to do my technical analysis searches I need without the need to call for any more help. (Hint- if you hit the same brick wall, do not waste time – simply pick up the phone and call Craig!)

Personally, my one use for Metastock V15 is for *searching*. I use it only as a back-up to help Jim create his Watch Lists for this Report. (JB Premium Charts remains my preferred program for actual *charting*.)



Very importantly, now that we can use local end-of-day data again with Metastock V15, I find it very convenient to use [JB Premium Data](#) to feed both my Metastock and my [JB Premium Charts](#) at the same time, without the need to pay for duplicate data.

On Page 20, Joseph Barrington-Lew explains that *JB Premium Data* can also be used with his popular [JBL Risk Manager](#) and provides a link to a video he created yesterday on how to do this.

If you have any queries on the above, simply send me an email for assistance at John@ShareTradingEducation.com. I usually aim to reply within 24 hours.



MONEY & RISK MANAGEMENT

2. JBL Risk Manager Update By Joseph Barrington-Lew

Money and Risk Management are absolutely vital for successful long term survival and profitability in the market.

Joseph Barrington-Lew is the creator of the popular [JBL Risk Manager](#) software and has written several in-depth articles for this Report over the years on this crucial topic.

In last week's Wrap '[Your Money & Risk Control 101](#),' Joseph:

1. Answered the frequently asked question;
"How much Capital do I need to start Trading and what if I haven't enough?"
2. Included 2 key Money and Risk Management Rules – which Joseph believes are essential for your long term survival
3. Explained that some of the best traders in the World make money less than 50% of the time – then set out what they do to make the difference in their overall success.

In today's article, we asked Joseph to provide an update on his popular [JBL Risk Manager](#) tool. At the end are links which allow you to take a [Free Trial](#) of Joseph's software and to *save \$50 this month* .

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1) Background to the JBL Risk Manager

Over 10 years ago I created the JBL Risk Manager after many investors and traders had requested a user-friendly, yet sophisticated calculator/program that would help them with the Money, Risk and Trade Management of their private Investing and Trading.

The software needed to do all the number crunching for individuals, based on available Capital and any realized profits/losses of open trades, using their current Stop.

Based on your individual risk tolerance, this tool needed to:

- ✓ Calculate a recommended maximum quantity of stocks to buy, based on each user's risk profile & specified risk parameters
- ✓ Suggest the price to set the Initial Stop Loss level, as a first guide
- ✓ Have the additional benefit of being able to move the suggested Stop Loss higher or lower, based on advice (e.g or technical indicators - of the program re-calculating criteria.
- ✓ Monitor open and closed position prices and risks based on the Preferred Stop Loss price level you enter and your risk tolerance.
- ✓ Be user-friendly, help you take emotion out of your trading/investing and to sleep better!

Over the last decade, I have progressively updated the JBL Risk Manager, often from constructive feedback received from Users of this program.

JBL Risk Manager is now at **Version 9.9** - which will:

- ✓ Automatically calculate your Trade/Position Size, Initial Stop Loss price, Trailing Stop when in profit, Break-even price and so much more, based on the last close.
- ✓ Allows you to:
 - Change your anticipated buy price to actual buy price (slippage)
 - Enter your Preferred initial Stop Loss but still control your Trade Size \$value
- ✓ Indicate when to look for another trade (control over trading and Pyramiding) and
- ✓ Automatically and accurately report on your performance by showing your:
 - Portfolio %win-loss ratios
 - Average \$win-loss
 - Trade expectancy and much more
 - Also includes, with kind permission from the Van Tharp Institute, performance values such as R-Multiples, R-Expectancy and System Quality Number.

The JBL Risk Manager integrates directly with:

1. Jim Berg's **JB Premium Data** (as supplied with **JB Premium Charts**)

To help users JB Premium Data users, this week I created a new video which leads you, step by step, through 'How to Load Premium Data into JBL Risk Manager'. To watch it, simply [Click Here](#) →

2. Other Metastock format "Legacy" local data (which you may be currently using).

Included in the User Guide is a link showing you how it will also integrate with the NEW MSLocal data created with the Metastock 15 Downloader. [Here is a link showing you](#) how to create your Local Data on your computer for JBL Risk Manager to read. Simply tick the appropriate box in the Settings page.

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2) Basics on Using the JBL Risk Manager

1. How to Set Your Preferred Initial Stop.....

Trading Summary

Open Trades

Symbol	Trade	Sector	Sector @ Risk	%Risk	INITIAL Order	Status	Profit or Loss @ Current STOP	Hold Or Exit

Open Trades: 0 Winning: 0 / 0% Winning Total: \$0 Average Winner: \$0 / 0.0% Trade Expectancy: \$0
 Losing: 0 / 0% Losing Total: \$0 Average Loser: \$0 / 0.0% Average Days Held: 0.0

Buttons: Backup Portfolios, Restore Portfolios

Closed Trades

Symbol	Trade	INITIAL Order Summary	FINAL Order Summary	Net(t) Profit / Loss	Portfolio Value	Drawdown	R - Multiple	Variance

Closed Trades: 0 Won: 0 / 0% Win Total: \$0 Average Win: \$0 / 0.0% Greatest Win: \$0 / 0.0% Trade Expectancy: \$0
 Lost: 0 / 0% Loss Total: \$0 Average Loss: \$0 / 0.0% Greatest Loss: \$0 / 0.0% Average Days Held: 0.0

Capital Management

Description	Date	Amount
Starting Capital	29/06/2017	25000

Total Brokerage: \$0.00 (Closed Trades) Total Gain/Loss (R): Standard Deviation:
 Average Expectancy (R): System Quality Number:

Core Capital: \$25000 Cash: \$25000

Portfolio Comparison: Compare

Current Portfolio: STE Portfolio

Buttons: Create New / Load Portfolio, Settings, Manage Capital, New Trade, Edit, Delete, User Guide, Close [X]

Click on "New Trade" | Click on "Select" | Enter Security Code | Click on Search result to confirm | Ok

Enter "Preferred Initial Stop" \$21.20 (Rec. 201 Shares) changed to \$19.99 (Rec. 131 Shares)

BHP - BHP BILLITON LIMITED ORDINARY

LONG TRADE Short Trade Sector: MATERIAL Core Trading Capital: 25000 Cash: 25000 Maximum %: 19 Trade Size

Profit Target (optional): Maximum \$: 4750 Trade Size

Symbol: BHP Recommended Buy Quantity: 131 Anticipated Buy Total: 3097.14

Buy Date: **SELECT** Buy Price: 23.49 x Quantity: + Brokerage: 19.95 = Actual Buy Total:

Date	Open	High	Low	Close	ATR MA	Stop Loss	% Stop	ATR Stop	Current Stop	Action	New Trailing Stop	Time Stop	S2	S1	PP	R1	R2

Maximum Risk %: 2 Risk %: New Trailing Stop: for Stock Split Next Trade at:

Maximum Risk R: 500 Actual Risk: **Initial Stop**: 21.20 Breakeven: Days Held:

Risk / Share: P/L per Share: Preferred Initial Stop: 19.99

Last Close: Based on current Stop: 19.99 Anticipated Sell Total:

Sell Date: Sell Price: x Quantity: - Brokerage: 19.95 = Sell Total:

Diary: Save Trade Cancel

Click on "Select" Anticipated Buy Date

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BHP - BHP BILLITON LIMITED ORDINARY

LONG TRADE Short Trade Sector MATERIAL: Core Trading Capital 25000 **HOLD** Cash 25000 Maximum % 19 Trade Size

Profit Target (optional) _____

Symbol BHP Recommended Buy Quantity 131 Anticipated Buy Total 3097.14 Maximum \$ 4750 Trade Size

Buy Date 3/07/2017 Buy Price 23.49 x Quantity 131 + Brokerage 19.95 = Actual Buy Total **3097.14**

Date	Open	High	Low	Close	ATR MA	Stop Loss	% Stop	ATR Stop	Current Stop	Action	New Trailing Stop	Time Stop	S2	S1	PP	R1	R2

Maximum Risk % 2 Risk % 1.99 New Trailing Stop _____ for Stock Split Next Trade at _____

Maximum Risk R 500 Actual Risk 498.40 **Initial Stop** 21.20 Breakeven 23.79 Days Held -2

Risk / Share 3.805 P/L per Share _____ Preferred Initial Stop 19.99

Last Close _____ Based on current Stop 19.99 Anticipated Sell Total 2598.74 ▼ \$-498.40 -16.09%

Sell Date **SELECT** Sell Price _____ x Quantity 131 - Brokerage 19.95 = Sell Total _____

Diary _____ 

Save Trade **Cancel**

Confirm Quantity by entering value then 'Save Trade'

JBL Risk Manager V9

Trading Summary   

Symbol	Trade	Sector	Sector @ Risk	%Risk	INITIAL Order	Status	Profit or Loss @ Current STOP	Hold Or Exit
BHP	Long	MATERIALS	2	2	\$23.49 x 131 + \$19.95 = \$3097.14 on 3/07/2017	Stop at \$21.20	\$19.99 x 131 - \$19.95 = \$2598.74, Loss \$-498.40 / -16.09% after -2 Days	HOLD

Open Trades: 1 Winning: 0 / 0% Winning Total: \$0 Average Winner: \$0 / 0.0% Trade Expectancy: \$-498
 Losing: 1 / 100% Losing Total: \$-498.40 Average Loser: \$-498 / -16.1% Average Days Held: -2.0

Closed Trades Print Reload Data Maximum Drawdown: \$0.00 / 0.000%

Symbol	Trade	INITIAL Order Summary	FINAL Order Summary	Net(t) Profit / Loss	Portfolio Value	Drawdown	R - Multiple	Variance

Closed Trades: 0 Won: 0 / 0% Win Total: \$0 Average Win: \$0 / 0.0% Greatest Win: \$0 / 0.0% Trade Expectancy: \$0
 Lost: 0 / 0% Loss Total: \$0 Average Loss: \$0 / 0.0% Greatest Loss: \$0 / 0.0% Average Days Held: 0.0

Capital Management

Description	Date	Amount
Starting Capital	29/06/2017	25000

Total Brokerage: \$0.00 (Closed Trades) Total Gain/Loss (R): \$-498.40
 Core Capital: **\$24501.60** Average Expectancy (R): -1.99%
 Cash: **\$21902.86**

Standard Deviation: _____
 System Quality Number: _____

Current Portfolio: [STE Portfolio](#) Portfolio Comparison: **Compare**

Create New / Load Portfolio Settings Manage Capital **New Trade** Edit Delete User Guide Close [X]

To compare your current portfolio against an Index or other Security Click on 'Compare';

Position Sizing aka Money Management is your first line of defense against catastrophic loss! It is regarded by successful traders to be one of the most important components of any Trading Plan.

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The JBL Risk Manager is designed to help you remove emotion and guesswork from your trading decisions,

When you combine intelligent Position Sizing with effective Risk Management and use a Stop Loss, you are planning for your long term trading and/or investment success!



**JBL
Risk
Manager**



Joseph Barrington-Lew created his useful [JBL Risk Manager](#) over 10 years ago. Next week Joseph provides an update on the latest version of his popular Money & Risk Management tool. Meanwhile;

1. In celebration of our 12th Anniversary of our weekly 'Investing & Online Trading Report, order this month to receive a **\$50 savings this month.**

2. **Click on these links:**

i) To start your [FREE 30 DAY TRIAL](#) of Joseph's JBL Risk Manager

ii) To watch a selection of [Joseph's videos and for more info](#)
(including how to upgrade if you have a previous version)

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

Click on this link now to [start your Replay ==>](#)

(AND download your Free Sample Edition of Jim Berg's unique 'Investing & Online Trading' Report)

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