



If You're in the Market You Need

ShareTradingEducation.com™

Your Free Wrap today is based on an extract from Edition 628 of our weekly

Mentoring-style 'Investing & Online Trading' Stock Report



Comparison

By Jim Berg and John Atkinson

Fourteen weeks ago, in Edition 614 of our '[Investing & Online Trading Report](#)', Jim issued his reasons for his concern for the Australian market at that time and issued his '**Exercise Caution and Take Profits**' announcement, ready for those Report and Signals Members who decided to follow Jim's lead and exit on Monday 8th May.

After Jim's timely announcement, the overall market fell during May, including the Diversified Financials Sector - led mainly by the 'Big 4' banks - probably as a direct reaction to the recently announced Bank Levy.

For those who chose not to exit, in Edition 614 we 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."

In Editions 617, 619 and 621 we showed charts of **CPU, ASL, SXL, CSR, NHF, CWY, AZJ**, and **WPL**, compared the 'Before and After' results and summarised them in a table with other shares which have been closed using Jim's traditional exit triggers since Jim's announcement.

3 months later, conventional stops have not yet been triggered for 1 of Jim's [Trading Signals](#), nor for 13 of Jim's [Investing Signals](#) shares which were open as at 8th May - so they are still 'open' for those who did not exit on 8th May.

Meanwhile, today we compare the 'Before and After' results* of 4 other recently closed notional Investing trades (excluding transaction costs and dividends received) below.

*The past performance of ShareTradingEducation.com ("STE") products shown below 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.

First, a quick recap:

1) Recap on Jim's Investing Approach

It is simply not possible to enter at the Lowest Low and exit at the Highest High. Jim's Investing approach on weekly charts is to:

1. Wait for a confirmed entry signal i.e a retracement within a rising trend, a JB Alert, then a JB Volatility Blue Bar Entry Signal, etc. (rather than trying to 'bottom fish')
2. BEFORE he enters a new position, Jim determines where he will exit if the share moves against him (i.e. his *weekly Initial Stop* and his recently introduced 10% Hard Stop for his Investing Signals Service)

Customer Caution Notice Jim Berg and John Atkinson are Authorised Representatives (AR Nos. 322724 and 1251439) and ShareTradingEducation.com Pty Ltd is a Corporate Authorized Representative (CAR No. 322726) of Longhou Capital Markets Pty Ltd, Australian Financial Services Licence AFSL 292464. Information provided in this document is of a General nature only. 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. The past performance of ShareTradingEducation.com ("STE") products is not and should not be taken as an indication of future performance. Caution should be exercised in assessing past performance. Please seek independent financial advice before you decide if this is appropriate for you. Refer also to the Customer Caution Notice at the back of this document and our [Terms and Conditions](#)

- Once the share price moves up sufficiently, switch to a *weekly Trailing Stop*, set further below price action than a trailing stop on a daily chart – to give the price action more 'room to move'
- Wait for the share price to roll over *after it peaks*, then to exit when a weekly Trailing Stop is triggered or if a close occurs on any day below *Jim's Emergency Stop*.

(#**PLEASE NOTE**: This Wrap is an *edited extract* from this week's Edition 628. Full details of Jim Berg's proven Investing and Trading Plan are provided to [Members](#) of our weekly mentoring-style '[Investing & Online Trading Report](#)').

2) Investing Signal PPT – Entry 19th December 2016

For those who did not exit the market on 8th May after Jim's announcement, notional Investing Signal trade **Perpetual (PPT)** was exited 3 months later on 7th August, after it triggered an exit by Jim's traditional Investing rules#.



Perpetual (PPT) Daily Chart

- JB Caution Take Profits Exit** on 8/5/2017 at a **+13.3%** notional profit
- For those still in market**: Exited on 7/8/2017 at a **+5.9%** profit target
- Before and After'* difference: **-7.4%** or **\$932 less profit** on a \$12,500 notional position

3) Investing Signal SHL– Entry 23th September 2016

For those who did not exit the market on 8th May after Jim's announcement, notional Investing Signal trade **Sonic Health (SHL)** was exited 3 months later on 7th August, after it triggered an exit by Jim's traditional Investing rules#, as shown in the chart below:

Customer Caution Notice Jim Berg and John Atkinson are Authorized Representatives (AR Nos. 322724 and 1251439) and ShareTradingEducation.com Pty Ltd is a Corporate Authorized Representative (CAR No. 322726) of Longhou Capital Markets Pty Ltd, Australian Financial Services Licence AFSL 292464. Information provided in this document is of a General nature only. 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. The past performance of ShareTradingEducation.com ("STE") products is not and should not be taken as an indication of future performance. Caution should be exercised in assessing past performance. Please seek independent financial advice before you decide if this is appropriate for you. Refer also to the Customer Caution Notice at the back of this document and our [Terms and Conditions](#)



Sonic Health (SHL) Weekly Chart

1. **JB Caution Take Profits Exit** on 8/5/2017 at a **+5.0%** notional profit
2. **For those still in market:** Exited 7/8/2017 at a **3.9%** profit
3. *Before and After'* difference: **-1.1%** or **\$144 less profit** on a \$12,500 notional position

4) Investing Signal ALL – Entry 11th November 2016

For those who did not exit the market on 8th May after Jim's announcement, notional Investing Signal trade **Aristocrat Leisure (ALL)** was *exited on 24th July*, after it triggered an exit by Jim's traditional Investing rules#.



Aristocratic Leisure (ALL) Weekly Chart

1. **JB Caution Take Profits Exit** on 8/5/2017 at a **+38.8%** notional profit
2. **For those still in market:** Exit on 24/7/17 at a **+39.6%** notional profit
3. *Before and After'* difference: **+0.8%** or **\$102 more profit** on a \$12,500 notional position

Customer Caution Notice Jim Berg and John Atkinson are Authorised Representatives (AR Nos. 322724 and 1251439) and ShareTradingEducation.com Pty Ltd is a Corporate Authorized Representative (CAR No. 322726) of Longhou Capital Markets Pty Ltd, Australian Financial Services Licence AFSL 292464. Information provided in this document is of a General nature only. 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. The past performance of ShareTradingEducation.com ("STE") products is not and should not be taken as an indication of future performance. Caution should be exercised in assessing past performance. Please seek independent financial advice before you decide if this is appropriate for you. Refer also to the Customer Caution Notice at the back of this document and our [Terms and Conditions](#)

5) Investing Signal SDF – Entry 11th November 2016

For those who did not exit the market on 8th May after Jim's announcement, notional Investing Signal trade **Steadfast Group (SDF)** was *exited on 17th July*, after it triggered an exit by Jim's traditional Investing rules#.



Steadfast Group (SDF) Weekly Chart

1. **JB Caution Take Profits Exit** on 8/5/2017 at a **+34.4%** notional profit
2. **For those still in market:** Exit on 17/7/17 at a **+20.3%** notional profit
3. *Before and After'* difference: **-14.2%** or **\$1,762** less profit on a \$12,500 notional position

6) Summary*

*The past performance of ShareTradingEducation.com ("STE") products shown above and below 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;

In our examples for our ['Investing & Online Trading Report'](#) Report and Jim's Signals Services, we assume a notional \$100k portfolio - split into 8 equal notional positions of \$12,500 each.

Similarly, for \$12,500 invested in Jim's **4 recently closed Investing Signals** shown above, the **TOTAL notional profits** * were:

1. If exited on 8th May 2017 after Jim's **'Take Profits'** announcement = **+\$11,442**
2. If exited LATER (*after Weekly Trailing Stops triggered*) = **+ 8,700**

I.e. Taking an exit on 8th May (rather than waiting for Jim's usual exit triggers later) would therefore have resulted in **+\$2,742 more profit** for these four notional [Investing Signals](#).

(* Excl. transaction costs & dividends received)

Customer Caution Notice Jim Berg and John Atkinson are Authorised Representatives (AR Nos. 322724 and 1251439) and ShareTradingEducation.com Pty Ltd is a Corporate Authorized Representative (CAR No. 322726) of Longhou Capital Markets Pty Ltd, Australian Financial Services Licence AFSL 292464. Information provided in this document is of a General nature only. 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. The past performance of ShareTradingEducation.com ("STE") products is not and should not be taken as an indication of future performance. Caution should be exercised in assessing past performance. Please seek independent financial advice before you decide if this is appropriate for you. Refer also to the Customer Caution Notice at the back of this document and our [Terms and Conditions](#)

Tables 1 and 2 below summarise all the 'Before and After' results* for the 18 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
CWY	Cleanaway	12/04/2017	\$1.245	\$1.285	3.2%	Profit Target	14/06/2017	\$1.430	14.9%	11.6%	\$ 1,456
AZJ	Aurizon	22/12/2016	\$5.05	\$5.35	5.9%	Trailing Stop	13/06/2017	\$5.44	7.7%	1.8%	\$ 223
AZJ	Aurizon	10/02/2017	\$5.12	\$5.35	4.5%	Trailing Stop	13/06/2017	\$5.44	6.3%	1.8%	\$ 220
ASL	Ausdrill	22/03/2017	\$1.41	\$1.385	-1.8%	Trailing Stop	17/05/2017	\$1.305	-7.4%	-5.7%	-\$ 709
NUF	Nufarm	16/02/2017	\$9.29	\$10.060	8.3%	Trailing Stop	16/05/2017	\$9.99	7.5%	-0.8%	-\$ 94
				MEAN	4.0%			MEAN	5.8%	1.8%	\$ 219

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
PPT	Perpetual	19/12/2016	\$47.75	\$54.11	13.3%	Trailing Stop	7/08/2017	\$50.55	5.9%	-7.5%	-\$ 932
SHL	Sonic Health	23/09/2016	\$21.76	\$22.85	5.0%	Trailing Stop	7/08/2017	\$22.60	3.9%	-1.1%	-\$ 144
ALL	Aristocrat Leisure	11/11/2016	\$14.70	\$20.40	38.8%	Trailing Stop	24/07/2017	\$20.52	39.6%	0.8%	\$ 102
SDF	Steadfast Group	11/11/2016	\$2.12	\$2.85	34.4%	Trailing Stop	17/07/2017	\$2.55	20.3%	-14.2%	-\$ 1,769
WPL	Woodside Petroleum	20/03/2017	\$31.36	\$31.99	2.0%	Trailing Stop	19/06/2017	\$30.35	-3.2%	-5.2%	-\$ 654
NHF	NIB Holdings	22/12/2016	\$4.81	\$6.19	28.7%	Emergency Stop	31/05/2017	\$5.16	7.3%	-21.4%	-\$ 2,677
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
CBA	Commonwealth Bank	14/02/2017	\$83.20	\$85.32	2.5%	Trailing Stop	22/05/2017	\$80.90	-2.8%	-5.3%	-\$ 664
SXL	Sth. Cross Media	16/12/2016	\$1.41	\$1.42	0.4%	Initial Stop	22/05/2017	\$1.21	-14.5%	-14.9%	-\$ 1,862
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
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
PGH	" "	23/11/2016	\$6.19	\$6.32	2.1%	Emergency Stop	10/05/2017	\$6.30	1.8%	-0.3%	-\$ 40
PGH	" "	9/08/2016	\$5.91	\$6.32	6.9%	Emergency Stop	10/05/2017	\$6.30	6.6%	-0.3%	-\$ 42
				MEAN	12.9%			MEAN	4.4%	-8.5%	-\$ 1,060

For these 18 notional trades closed on 8th May 2017, these two Tables show:

1) Trading Signals:

4 out of 5 were profitable, with only 1 loss, i.e. a success rate of **80%**

2) Investing Signals

12 out of 13 were profitable, with only 1 loss, i.e. a success rate of **92%**

Overall, for these 13 closed Investing trades, taking an exit on 8th May after Jim's '**Take Profits**' announcement in Edition 614 of our '[Investing & Online Trading Report](#)' (rather than waiting for a conventional exit) would have yielded for notional \$12,500 positions in a \$100k notional portfolio:

A) **5 Trading trades:** An average of **-1.8%** or **+\$219 LESS** profit / trade

B) **13 Investing trades:** An average of **+8.5%** or **+\$1,060 MORE** profit/ trade

Alternatively, **TOTAL notional Investing profits** * for these 13 Investing trades:

1. If exited on 8th May 2017 after Jim's '**Take Profits**' announcement = **+\$20,980**

2. If exited **LATER** (after Weekly Trailing Stops triggered) = **+ 7,203**

I.e. Taking an exit on 8th May after Jim's timely '**Take Profits**' announcement in Edition 614 of this Report (rather than waiting for Jim's usual exit triggers later) would have resulted in **+\$13,777 more profit overall** for these 13 notional closed [Investing Signals](#)

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 due course.

Customer Caution Notice Jim Berg and John Atkinson are Authorised Representatives (AR Nos. 322724 and 1251439) and ShareTradingEducation.com Pty Ltd is a Corporate Authorized Representative (CAR No. 322726) of Longhou Capital Markets Pty Ltd, Australian Financial Services Licence AFSL 292464. Information provided in this document is of a General nature only. 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. The past performance of ShareTradingEducation.com ("STE") products is not and should not be taken as an indication of future performance. Caution should be exercised in assessing past performance. Please seek independent financial advice before you decide if this is appropriate for you. Refer also to the Customer Caution Notice at the back of this document and our [Terms and Conditions](#)

7) Where To From Here?

While speculation about the imminent collapse of the S&P 500 continues, [in this week's Latest Edition 628](#), we include **our latest views** on the **Australian** and **USA markets**. To read more, click on the following links now to either:

- 1) Order [this week's Edition](#) for only \$9.97 **OR** to
- 2) [Become a Member](#) of Jim Berg's mentoring-style Report (*with no lock-in contract*)



To Continue Reading...

In this week's [latest EDITION 628 - Order Your Single Copy Here >>](#)

Article	Author	Page
Feedback on New Mentoring Initiative	John Atkinson	2
Jim's Market Update	Jim Berg and John Atkinson	4
Notional Short Term Trading Portfolio Updates for Australia and USA	J im Berg and John Atkinson	6
Recent JB Alerts ASX300 & USA	Jim Berg and John Atkinson	10
Before & After Comparison	Jim Berg and John Atkinson	13
How to Filter a List of Experts' Picks for 2017	Jim Berg and John Atkinson	17
Guppy View of the Market	Daryl Guppy, CEO Guppytraders	21
The Last Word	John Atkinson	24

Jim Berg's Aim is to Help You

**Become a Confident Trader & Investor
in Just 12 weeks**

with his hands on 'learn-by-doing' mentoring style
'[Investing and Online Trading](#)' weekly Report

To join now, or for more info [Click Here Now →](#)

).

Customer Caution Notice Jim Berg and John Atkinson are Authorised Representatives (AR Nos. 322724 and 1251439) and ShareTradingEducation.com Pty Ltd is a Corporate Authorized Representative (CAR No. 322726) of Longhou Capital Markets Pty Ltd, Australian Financial Services Licence AFSL 292464. Information provided in this document is of a General nature only. 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. The past performance of ShareTradingEducation.com ("STE") products is not and should not be taken as an indication of future performance. Caution should be exercised in assessing past performance. Please seek independent financial advice before you decide if this is appropriate for you. Refer also to the Customer Caution Notice at the back of this document and our [Terms and Conditions](#)

Have You Watched Your FREE Webinar Yet?



'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)

General Advice Warning: This document is a tool to assist you in your personal judgment. It is not designed to replace your Licensed Financial Consultant or your Stockbroker. In preparing this document, Jim Berg and John Atkinson as Authorised Representatives (AR Nos. 322724 and 1251439) and ShareTradingEducation.com ("STE"), as Corporate Authorised Representative (CAR No. 322726) of Longhou Capital Markets Pty Ltd ("LCM") Australian Financial Services Licence AFSL 292464, have not taken into account the investment objectives, financial situation and particular needs of any particular investor, because readers come from diverse backgrounds, with diverse objectives and financial situations.

Because of that, the customer should, before acting on the advice, consider the appropriateness of the advice, having regard to their objectives, financial situation and needs; and, if the advice relates to the acquisition, or possible acquisition of a particular financial product, the customer should obtain a Product Disclosure Statement or offer document relating to the product and consider the Statement before making a decision about whether to acquire the product.

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.

STE and/or LCM and its officers, employees, agents, associates and alliance partners ("Associates") may have or may obtain an interest in the securities referred to in this letter and will receive commissions, brokerage and other fees from dealing in the securities or advising in respect of the proposed listing of the securities. LCM and/or STE believe that the information contained in this letter was accurate at the time it was compiled.

Performance Caution: Direct investing in the stock market can result in financial loss. The past performance of STE products 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.

Jim Berg, John Atkinson and STE believe that the information contained in this document was accurate at the time it was compiled. However, results reflect absolute trading stop loss discipline. Any projections made in this document are estimates only and no representation is being made that any account will or is likely to achieve profits or losses similar to those shown. Stock tips, buy or sell recommendations are not provided in this document.

All case study trades are notional examples using reasonably attainable entry and exit points. Results reflect absolute trading stop loss discipline. Unlike an actual performance record, simulated results do not represent actual trading. Also, since the trades have not actually been executed, the results may have over or under compensated for impact, if any, of certain market factors, such as lack of liquidity

Copyright: The information contained in this document is copyright © 2017 and for the sole use of trial and prepaid readers. It cannot be circulated to other readers without the permission of the ShareTradingEducation.com. Contributed material reflects the personal opinion of the authors and is not necessarily those of the publisher. Articles accurately reflect the personal views of the authors. Sharetradingeducation.com is an independent financial education organization and research is supported by subscription fees and affiliate rebates.

OFFICES: Copacabana, NSW 2251, Australia and Glen Iris, Victoria 3146, Australia.

Disclosure of Interest: LCM/STE and their associates and authors of the *Investing & Online Trading Report*© team may hold shares in the companies featured in this Report. **Further Conditions** are specified in the [Terms and-Conditions](#) at www.sharetradingeducation.com.