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Mentoring-style 'Investing & Online Trading' Stock Report**



## November Trading Signals Results By John Atkinson

In Edition 614 of our weekly 'Investing & Online Trading' Report, Jim Berg drew attention to the fact that the ASX 200 (XJO) and several other Australian Indices had given a **Key Reversal** on weekly charts the day before, on Friday 5<sup>th</sup> May.

He announced that he had decided to exercise caution at that time and on Monday 8<sup>th</sup> May 2017:

1. Jim would exit all 'open' notional positions in:
  - a) Our weekly Report's notional Portfolio and
  - b) His [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 see that Jim's call was very timely as the Australian market:

1. Retraced during May and June 2017, then
2. 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 did decide to continue trading between 5<sup>th</sup> May and 10<sup>th</sup> 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 recent weeks I have been detailing these and other more traditional selection criteria Jim uses to filter 'which shares to buy'. I plan to continue with more in this section of our mentoring-style '[Investing & Online Trading](#)' Report soon.

Meanwhile, last week, we took time out to look back at how well "*.....the proof is in the pudding*". With less Signals entered, we posed the question; "*...for those trades which do qualify, how well are they performing?*"

We showed that in November 2017, as at Friday 24<sup>th</sup>, there had been 3 closed notional Trading Signals Exits, all of which had achieved their **15% Profit Targets**.

Charts and entry/exit notes for each of those 3 notional Trading Signals trades were provided in 'The Last Word' of Edition 643 and are republished below:.

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**Stock #1\*** was the 1<sup>st</sup> notional trade to be exited from Jim's Trading Signals Service in November 2017:



*Stock #1 Daily Chart*

**Action:** Date 'Purchased': 17/7/2017. Purchase Price: \$17.72  
Exit on 01/11/2017 at \$20.38 at a notional **+ 15.0% Profit Target**

**Stock #2\*** was a notional trade in Jim's Trading Signals AND in our Report's notional short term trading portfolio:



*Stock #2 Daily Chart*

**Action:** Date 'Purchased': 6/10/2017 (Report Ed 636) Purchase Price: \$2.11  
Exit on 02/11/2017 at \$2.43 (Report Ed 640) at a notional **+ 15.2% Profit Target**

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**Stock #3\*** was the 3<sup>rd</sup> notional trade to be exited from Jim's Trading Signals Service in November 2017:



Stock #3 Daily Chart

**Action:** Date 'Purchased': 9/10/2017. Purchase Price: \$14.72  
 Exit on 17/11/2017 at \$16.93 at a notional **+ 15.0% Profit Target**

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In the final week of November, 2 more Trading Signals triggered Exit Signals, of which 1 notional trade was closed at a **loss** and the other was **profitable**, as detailed below:

On Tuesday 24<sup>th</sup> October 2017, Trading Signals Members were advised of a new Entry Signal in **Stock #4\***.

Day	Date	Ticker Code	Comment	Capitalisation / Industry Group	JB Fundamentals Met?	Dividend Yield	Max Entry Price	Initial Stop Loss	Initial Trade Risk
Tues	24/10/2017	#4	JB Blue Bar Entry Signal	Consumer Services	No	4.3%	\$ 2.30	\$ 2.07	-10.0%

The screenshot above, from the Trading Signals Entry Log that night, highlighted Jim's May 2017 Caution to Members in yellow and showed the following details:

- 1) *Entry Signal:* Stock #4\*
- 2) *Industry Group:* Consumer Services
- 3) *Jim's Fundamental Criteria met:* No (so it was not posted as an Investing Signals Entry)
- 4) *Dividend Yield:* 4.3%
- 5) *Jim's suggested Maximum Entry Price:* \$2.30
- 6) *Initial Stop Loss (Note: Decided by Jim BEFORE entry):* \$2.07
- 7) *Corresponding Initial Trade Risk (if triggered at that price):* **-10.0%**

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This Initial Trade Risk (of **-10%**) is at the outer limit of Jim's range of target losses. We have previously written that:

- At that extremity, it only needs a small slippage to occur in the actual exit price for the *final result to end up more than -10% loss.*
- Traders looking to minimise their losses may consider either:
  - i) **Lowering their entry price** to reduce their planned Initial Trade Risk, or
  - ii) **Avoiding such trades completely** and looking for alternative Entry Signals, with smaller planned Initial Trade Losses

On Wednesday 29<sup>th</sup> November 2017, **Stock #4\*** closed at \$2.00, i.e. below Jim's nominated Initial Stop of \$2.07. Accordingly, that night Signals Members were notified of an Exit Signal for the following day, as shown in this extract from this week's Trading Signals Exit Log:

Day	Exit Date	Ticker Code	Comment
Wed	29/11/2017	#4	For those who didn't exit 8/5: Close Below Initial Stop. To Exit on the following day.
Tues	28/11/2017	#5	For those who didn't exit 8/5: sold at a 14.9% Profit Target
Mon	27/11/2017		
Fri	24/11/2017		
Thurs	23/11/2017		
Wed	22/11/2017		
Tues	21/11/2017		
Mon	20/11/2017		
Fri	17/11/2017	#3	For those who didn't exit 8/5: sold at a 15% Profit Target

In this case, the actual resulting loss did in fact slip *an extra 3%* more than the target Initial Trade Risk – from **-10%** to **-13%**. The following chart shows the history for **Stock #4\***



Stock #4 Daily Chart

**Action: Date 'Purchased': 26/10/2017. Purchase Price: \$2.30**  
**Exit on 30/11/2017 at \$2.00 at a notional -13.0% loss**

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In addition to the 3 above, on Tuesday 28<sup>th</sup> November 2017, a 4<sup>th</sup> notional Trading Signal trade (**Stock #5\***) was also exited at its **15% profit target** as shown in the following chart:



*Stock #5\* Daily Chart*

**Action: Date 'Purchased': 10/10/2017. Purchase Price: \$1.375**

**Exit on 28/11/2017 at \$1.58 at a notional + 14.9% Profit Target**

The following Table summarises Jim's closed notional Trading Signals during November 2017:

Stock #	Entry Date	Entry Price	Exit Trigger	Exit Date	Exit Price	Weeks in Trade	Profit / Loss (%)	Profit / Loss *(\$)
1	17/07/2017	\$17.72	15% Profit Target	1/11/2017	\$20.38	15.3	15.0%	\$ 1,876
2	6/10/2017	\$ 2.11	15% Profit Target	2/11/2017	\$2.43	3.9	15.2%	\$ 1,896
3	9/10/2017	\$14.72	15% Profit Target	17/11/2017	\$16.93	5.6	15.0%	\$ 1,877
4	26/10/2017	\$2.300	Initial Stop	29/11/2017	\$2.00	4.9	-13.0%	-\$ 1,630
5	10/10/2017	\$1.375	15% Profit Target	28/11/2017	\$1.58	7.0	14.9%	\$ 1,864
					<b>Mean</b>	<b>7.3</b>	<b>Total</b>	<b>\$ 5,882</b>
						(weeks)		

In our [weekly Report's notional portfolios](#) and in Jim's [Trading & Investing Signals Services](#), we use example notional \$100k portfolios - split into 8 equal sized notional positions of \$12.5k for each notional position. Again, adopting notional \$12,500 positions here, the summary Table above shows\*:

- 1) There were 5 closed notional trades from [Jim's Trading Signals Service](#) in November
- 2) There was only 1 notional loss. *I.e. **80% success rate** (vs Jim's target of 50-70%)*
- 3) **All 4 profitable trades achieved their 15% Profit Targets**
- 4) The mean (average) duration of these notional trades was 7.3 weeks
- 5) The net notional profit was **\$5,882** (excl. transaction costs & dividends received)

I.e. these 5 closed trades would have **added 5.8% to a notional \$100k Portfolio** in an average of 7.3 weeks.

More notional positions remain open in Jim's Australian Trading & Investing Signals Services and in our weekly Report's notional Portfolios for USA and Australia. We will report on their progress later. Also, since November 10<sup>th</sup> 2017, Jim is now looking for additional new Entry Signals on behalf of his Report and Signals Members.

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[Jim Berg's Trading Signals](#) →



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