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Your Free Wrap today is based on an extract from Edition 728 of our weekly mentoring-style '[Investing & Online Trading](#)' Stock Market Report



Jim Berg's Live \$100K Investing Signals Portfolio: Update By John Atkinson and Jim Berg

1. Portfolio Design

For Jim Berg's 'Live \$100K Investing Signals Portfolio', we:

1. Aim to 'cut losses & let profits run' and expect that a few shares will outperform others
2. Feature notional positions, as selected by Jim for his [Investing Signals Service](#), using his proven 'Weight-of-Evidence' Technical Analysis Entry Rules (as taught in our weekly ['learn-by-doing' Report](#))
3. Split the \$100k into 8 x \$12.5k notional positions
4. Started to create this notional portfolio for 2019 on 28th December 2018 (*see below*)
5. Progressively add new positions to the portfolio in exactly the same consecutive order as they occur in Jim's Investing Signals Service
6. Note that once the first 8 positions were full, then no new extra positions can be added until any existing Positions are exited
7. Hold all notional positions until an Exit Signal(s) is announced
8. Action that after exit, replace the notional position with the next new weekly Investing Entry Signal(s) to appear

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2. The First Quarter Recap

When we originally published Edition 700 of our weekly '[Investing & Online Trading](#)' Report on 29th December 2018, the Australian market was in a **falling trend**, so we announced the introduction of our new initiative to look for '*Rising Shares in a Falling Market*' at that time:

"As at Friday 28th December's Close, Jim has identified the first of 3 new Entry Signals which pass all his tightened entry rules for '*Rising Shares Within Falling Markets*' - so we will post these for [Signals Members](#) to look at over this weekend."

We posted those first 3 confirmed Entry Signals for '*Rising Shares in a Falling Market*' into Signals Members' **Entry Logs** that weekend. The data included:

- ✓ Jim's recommended Maximum Entry Prices
- ✓ His Initial Stop Loss values and
- ✓ His suggested Position Sizing and
- ✓ Associated Money and Risk Management criteria. E.g. *Trade Risk & Portfolio Risk*

All 3 shares met Jim's suggested entry price on the following Monday 31st December 2018, so they were added as the first 3 new positions on the Signal Members' [Master Logs](#).

(We use our 2 Master Logs as working tools, on behalf of Signals Members, to monitor all open positions daily and to update prices, Profit Targets, Stop Loss type and values.)

Three months later, in Edition 713 of 30th March 2019, we provided our first quarterly update for Jim's '*\$100k Live Investing Signals Portfolio*'. This included:

' Since 28th December 2018, there has been a total of **17 Entry Signals** which have passed Jim's '*Weight-of-Evidence*' entry criteria - and Jim's suggested maximum entry price:

- The first 8 Signals were '*entered*' in the Investing Signals Master Log between 31st December 2018 and 1st Feb. 2019.
- **ALL** of the first 8 Entry Signals remain **OPEN**, as at Friday 29th March 2019
- This means that after those first 8 positions were filled, there has been *no further cash available* to add any further trades, until an exit is made, in the future, from any of those first 8 notional positions
- A net overall combined notional profit of **\$10.17k** or a **+10.2% increase** to a Jim's \$100K notional Investing Signals Portfolio **in approx. 3 months.**'

3. The Second Quarter Update

Since our last update:

1. On 5th April 2019, the Australian market switched to a **rising trend**, by Jim's documented trend definitions

- In the 6 months between Friday 28th December 2018 and 28th June 2019, Jim issued a total of **44 new Entry Signals** for Investing which have met his recommended Maximum Entry Prices.
- As at 28th June 2019, of the first 8 notional positions in this \$100k Live Investing Portfolio, 3 shares (*Signals 3, 6 and 7*) and one replacement (*Signal 22*) have since been exited and replaced at a total net notional loss of **-\$4.4k**, as shown in Table 1 below:

TABLE 1 :
Jim Berg's 100K Live Investing Signals Portfolio: Closed Notional Positions

	Exited Signal				Replaced By	
	Signal No	Date Exited	Profit or Loss after dividends (%)	Profit or Loss after dividends (\$)	Signal #	Date Entered
A) First 8 positions	3	2/04/2019	-8.9%	-\$ 1,111	18	10/04/2019
	6	23/04/2019	-8.3%	-\$ 1,038	22	24/04/2019
	7	18/06/2019	3.1%	\$ 392	41	19/06/2019
B) Replacement positions	22	3/06/2019	-21.1%	-\$ 2,632	28	5/06/2019
				-\$ 4,390		

- The other 5 original positions and 3 replacements remain open, as shown in Table 2:

TABLE 2:
Jim Berg's 100K Live Investing Signals Portfolio: Open Notional Positions

Signal No.	Comments	Current Price	Purchased Price	Entry Date	Total Returns (incl dividends)*		
					%	Total Profits	
1	Supply-chain logistics	\$12.88	\$10.23	31/12/2018	27.3%	\$ 3,415	
2	Logistics company	\$3.04	\$2.59	31/12/2018	18.8%	\$ 2,355	
4	Retailer of baby goods	\$2.16	\$2.19	3/01/2019	0.1%	\$ 17	
5	Information technology & cloud computing	\$2.86	\$1.24	4/01/2019	131.5%	\$ 16,431	
8	Exploration for gold & other minerals.	\$11.65	\$8.74	1/02/2019	34.0%	\$ 4,248	
18	Explosives & tunneling ground support	\$20.27	\$18.22	9/04/2019	11.3%	\$ 1,406	
28	Metallurgical & thermal coal producer	\$1.425	\$1.365	5/06/2019	4.4%	\$ 549	
41	Automotive parts & service	\$1.71	\$1.78	19/06/2019	-4.2%	-\$ 527	
						Open Trades	\$ 27,896
Prices correct as of close of trade 28 June 2019						Less 4 Closed Trades	-\$ 4,390
(* excl transaction fees)						Total Net Open & Closed Returns	\$ 23,506
						I.e	23.5%
							in 6 months

As at 28th June 2019, Table 2 shows a healthy net combined notional open profit (*after losses*) of **\$23.5K** or a **+23.5% increase** to [Jim Berg's 'Live \\$100K Investing Signals Portfolio'](#) **in Six Months***.

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