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Your Free Wrap today contains an extract from Edition 740 of our weekly mentoring-style '[Investing & Online Trading](#)' Stock Market Report

New ! Monthly Investing Signals Portfolio By John Atkinson and Jim Berg



1. Signals Background

Currently, as educational support for our Signals Members, we provide Buy and Sell Signals for:

1. [Trading](#) (using daily charts) and [Investing in Australian shares](#) (using weekly charts) and
2. [Exchange Traded Funds](#) (ETFs)

all based on Jim's unique JB Volatility Indicators and his proven '*Weight-of-Evidence*' approach.

In recent months we have progressively published the performance of Jim's notional '*Live \$100k Investing Signals Portfolio*' when managed using *weekly charts*.

Starting today, we also compare the performance when the same Entry Signals were managed using **monthly charts**.

At the end of this article you will also be given the opportunity **to express your interest** in a **proposed new Monthly Investing Signals** Service.

First, as background on our existing Signals, each night Jim and his team:

- 1) Scan the Australian market to find a list of potential entries
- 2) Physically open and inspect the charts for each one
- 3) Visually check and filter out those which are NOT in rising trends
- 4) Manually sort out those which:
 - ✚ Are confirmed **bona fide** Entry Signals vs those which
 - ✚ **Fail** Jim's entry criteria, so they end up on his '*Cutting Room Floor*' for Members to look at for interest purposes only. .
- 5) Then, for EACH of those shares which have given a confirmed Entry Signal, we manually go through Jim's checklists and advise Signals Members of the:
 1. Stock Name and Code
 2. Industry Group
 3. Whether it passes Jim's fundamental criteria or not
 4. Dividend Yield
 5. Maximum Suggested Entry Price

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6. Suggested Initial Stop Loss Price
 7. Suggested No of shares (or ETFs)
 8. Initial Trade Risk (%) and Portfolio Risk (% and \$s)
- 6) Publish a separate list of those shares which were filtered out to end up on our '*Cutting Room Floor*', for Members to have a look at.
 - 7) For every confirmed Entry Signal which meets Jim's suggested Entry Price, we then continually manage each notional position, including updating Profit Targets and ratcheting up of Stops, as applicable, until an Exit Signal is triggered.
 - 8) We then notify [Signals Members](#) accordingly and log the results on the Signals Exit and Master Logs.

2. Weekly Investing Portfolio

In our '[Investing & Online Trading Report](#)' in recent months, we have progressively featured regular updates on Jim's \$100k 'Live' **Weekly Investing Portfolio**, which we commenced on 28th December 2018 - in which 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 Weekly Investing Signals Service,
3. Progressively add new positions to the portfolio in exactly the same consecutive order as they occur in Jim's Weekly Investing Signals Service
4. Note that once the first 8 positions were full, then no new extra positions can be added until any existing Positions are exited
5. Hold all notional positions until an Exit Signal(s) is announced
6. Replace the exited position(s) with the next new weekly notional Investing Entry Signal(s) to be nominated in Jim's [Weekly Investing Signals](#) Service.

3. Introducing our New 'Live' \$100K Monthly Investing Signals Portfolio

This year, in our [Report's 'Game Changer](#) case study Tutorials, we also introduced our new initiative for MONTHLY Investing, in which we*:

- A. Now provide a new and structured approach, aimed to take advantage of strong **rising trends** for **significantly longer**, while still having documented exit strategies in place should the market turn down (albeit at later dates than by using our traditional *daily* or *weekly charts*.)
- B. Use a series of new Stops on *monthly charts* which are much LOWER than those which we usually use on *daily* or *weekly charts*.

These Stops are therefore *further away* from *the day-to-day/week* to week '*noise*' of the market and should hopefully help to reduce '*whipsawing*' - whereby trades are exited with disciplineand the stock rebounds and continues upward soon after.

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- C. Allow trades in rising trends to run for, hopefully, a few years before an Exit Signal is triggered*
- D. Aim to achieve larger profits over a longer time frame and with less effort to monitor*
- E. However, since we first commenced coverage of this new time frame, we have also highlighted "Monthly Investors *will need to be prepared for potential significant draw down*, compared with Jim's Trading or traditional Weekly Investing Rules."*

As a logical next step, today we are pleased to announce the reporting of our new '**Live**' **\$100K MONTHLY Investing Signals Portfolio** which now runs side-by-side with our existing 'Live' WEEKLY Investing Signals Portfolio.

This new Monthly notional portfolio is structured in a very similar way to the notional Weekly Investing Portfolio outlined above, except that*:

1. At some stage, we may decide to implement some additional entry criteria filters
2. Positions are monitored using our new MONTHLY Stops instead of our Weekly Stops
3. This longer term Monthly Investing Signals Portfolio is designed to remain open until its ***individual Stops for the component stocks are triggered.***

I.e. It will *not* be closed when we close the Trading and/or Weekly Signals portfolio due to increased volatility/ various market caution notices, etc.*

The UPSIDE of this is that if markets rebound *upwards* after a correction (as occurred in September 2019) then many positions may still be open in this new portfolio to take advantage of the recovery – as their Stops may be sufficiently below the price action to avoid being triggered.*

4. The DOWNSIDE of this is that if markets continue *downwards* after a correction (E.g. as occurred for almost 1.5 years during the GFC after Jim first closed this Report's trading portfolio in January 2008), then there may be *potentially significantly more draw down* before the new Monthly Stops are triggered, compared with Jim's Trading or traditional Weekly Investing Rules – see E above.*

Overall, our aim is that*:

- ✓ In rising markets, we would expect to have up to notional positions in the Monthly Investing Signals Portfolio which trend upwards for months - ***and hopefully years**** - before they finally trigger Exit Signals on monthly charts, as per our examples in our ['Game Changer' case study Tutorials](#) featured in our Report this year.
- ✓ If individual trades go against us, we will employ our new Monthly Initial Stop, Hard Stop and new Breakeven Stop to help minimise losses*.
- ✓ In time, we will have different notional trades within the Monthly vs Weekly 'Live' \$100K Portfolios. This is because any trade may be exited at a different date depending on the exit trigger for each respective time frame, so in turn, their replacement trades will be selected independently.

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- ✓ This will provide us with a side-by-side comparison of 2 'live' notional Portfolios in 2 separate time frames to monitor and progressively report on, as additional education*.

4. WEEKLY Investing Signals Portfolio Performance Update

In Editions 713, 728, 731 and 736 of our '[Investing & Online Trading Report](#)' we showed that commencing 28th December 2018, Jim's notional '\$100k Live Weekly Investing Signals Portfolio' was at*:

- ✚ 29th March 2019: Net open profit (after losses) of **+\$10,173 (+10.2%)** in 3 months
- ✚ 28th June 2019: Net open profit of **+\$23,506 (+23.5%)** in 6 months
- ✚ 31st July 2019: Net open profit of **+\$29,871 (+29.9%)** in 7 months
- ✚ 31st August 2019: Net open profit of **+\$18,498 (+18.5%)** in 8 months

We do not try to predict what will happen at any stage. Rather, Jim Berg's approach is to '*make hay while the sun shines*', then react in response to price changes*.

For instance, the significant and unusual increased market volatility and uncertainty due to the August Reporting Season and the USA/China Trade War began to result*:

- In an increase in the number of notional trades being closed at a loss - compared with a few months before.
- Some larger draw-downs than usual in Jim's Weekly Investing Signals

Therefore, on Tuesday 6th August 2019 we closed all open notional Trading and Weekly Investing Signals positions, including Jim's '*Live \$100k Weekly Investing Signals Portfolio*'. For comparison purposes, we continue to report daily to Signals Members on the progress of all open Signals positions as at 5th August, until they give a traditional exit trigger*.

As at 31st September 2019, there is no change to the Weekly Investing Signals Portfolio value, pending the opening of new Entry Signals, subject to suitable market conditions*.

5. MONTHLY Investing Signals Portfolio Performance

In the 7 months between Friday 28th December 2018 and 1st August 2019, Jim issued a total of **52 new Entry Signals** for Investing which met his suggested maximum entry prices.

Starting with Signal Numbers 1 to 8, Table 1 below shows the 4 CLOSED notional trades for our new **Monthly Investing** Signals Portfolio since December 2018, *as at 30/10/2019*:

	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	9/04/2019
	6	5/04/2019	-1.3%	-\$ 168	20	10/04/2019
	7	1/08/2019	2.2%	\$ 274	N/A	N/A
B) Replacement positions	20	16/08/2019	-9.3%	-\$ 1,168	N/A	N/A
				-\$ 2,173		

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Monthly Portfolio Table 1 above shows*:

1. **Signal 3** was exited on 2/4/19 (using our new Monthly Hard Stop) and replaced with Signal 18 on 9/4/19.
2. **Signal 6** was exited on 5/4/19 (using our new Monthly Breakeven Stop) and replaced with Signal 20 on 10/4/19
3. **Signal 7** was exited at **+2.2%** on 1/8/19 (using our new Monthly Trailing Stop).
4. As a result, 'funds' were NOT available to replace Signal 7 in the Monthly Portfolio until 1/8/19. In this current market, Jim has chosen not to add any new Entry Signals since 1st August 2019, so this position remains 'in cash' and is shown as 'N/A' in the replacement columns.
5. The replaced position **20** (see 2. above) was exited at a **-9.3%** loss on 16/8/19.
6. Again, this remains as a second notional position 'in cash', so is also shown as 'N/A' in the replacement columns.

TABLE 2:						
Jim Berg's 100K Live MONTHLY Investing Signals Portfolio: Open Notional Positions as at 30 September 2019						
Signal No.	Comments	Current Price 30 Sept 2019	Purchased Price	Entry Date	Total Returns (incl dividends)*	
					%	Total Profits
1	Supply-chain logistics	\$11.40	\$10.23	31/12/2018	12.9%	\$ 1,607
2	Logistics company	\$3.20	\$2.59	31/12/2018	26.1%	\$ 3,267
4	Retailer of baby goods	\$3.55	\$2.19	3/01/2019	65.9%	\$ 8,242
5	Information technology & cloud computing	\$2.62	\$1.24	4/01/2019	112.1%	\$ 14,012
8	Exploration for gold & other minerals.	\$11.04	\$8.74	1/02/2019	26.3%	\$ 3,289
18	Explosives & tunneling ground support	\$22.54	\$18.22	10/04/2019	24.9%	\$ 3,115
-	In cash' pending Jim's next new Entry Signal		\$0.000			\$ -
-	In cash' pending Jim's next new Entry Signal		\$0.00			\$ -
					Open Trades	\$ 33,532
					Less 4 Closed Trades	-\$ 2,173
						Total Net Open & Closed Returns \$ 31,359
						I.e 31.4%
						in 9 months

Table 2 above* shows the OPEN positions of our new notional Monthly Investing Signals Portfolio, as at 30th September 2019. It includes:

1. Two positions 'in cash', awaiting Jim's next new Entry Signals (see 4. and 6. above)
2. The offsetting of the 4 closed trades since 28th December 2018, totalling a notional **-\$2,173** loss (see Table 1 above)
3. Total net open and closed notional returns (excl transaction costs) of **+\$31,359**, or **+31.4%** on a notional \$100k Live Monthly Investing Signals Portfolio **in 9 months**.

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After the August 2019 correction, the market rebounded in September, so the Monthly Investing Signals Portfolio is currently ahead of the Weekly Investing Signals Portfolio which was closed on 6th August 2019, pending a return to normal volatility (*see above*).

October is generally regarded as a volatile month. From here:

1. If the market heads *down*, then those Weekly Investors who went to cash will be protected from further falls
2. If the market heads *up* (e.g. due to a positive settlement on the trade war this week), then Jim will resume adding new Entry Signals to his [Trading](#) and [Weekly Investing](#) Signals Services.
3. We plan to continue to monitor the notional Weekly and Monthly Investing Signals Portfolios featured here today, for ongoing comparison and educational interest

6. Your EOI?

We are considering adding a **new 'done-for-you' Monthly Investing** Signals Service in the near future, whereby on behalf of Signals Members, we:

1. Provide Entry Signals for Monthly Investing
2. Monitor all open positions and adjust Stop types and values, as applicable
3. Notify when any Exit Signals are generated, using our new Monthly Investing Rules

If you consider this may be of value to you, then please email us your EOI (Expression of Interest) at Info@ShareTradingEducation.com and simply:

- Say '**YES**' and include your first name in the subject line to express your interest (*no need for an essay and of course there will be no obligation to join*)

so we can gauge the demand for this initiative. Thank you!

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