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Your Free Wrap today contains an extract from Edition 772 of our weekly mentoring-style 'Investing & Online Trading' Stock Market Report



## Jim Berg's Investing Signals Portfolio Outperforms Warren Buffet

On 1<sup>st</sup> February 2020, in Edition 757 of our hands-on '[Investing & Online Trading](#)' weekly stock market Report, we:

1. Wrote: 'Due to increasing concerns re the Coronavirus, volatility has now switched to a "dangerous" level, so we are not recommending any new Entry Signals at this time'
2. Detailed the precise level at which we would exit Jim Berg's Trading and Investing Signals Services if the overall market were to retrace.

This occurred on 26th February, so on 27th February, as a '*Cautionary Virus Exit Signal*', we closed Jim's 2 remaining 'open' Investing Signals. (All notional Trading Signals positions had already triggered Stops.)

The following Table and chart compare the performance of Jim's 'Live' \$100k Medium Term Investing Signals Portfolio\* (since it was launched on 28<sup>th</sup> December 2018), vs the ASX200 (XJO) as at Friday 15<sup>th</sup> May 2020:

### Notional Performance Comparison :

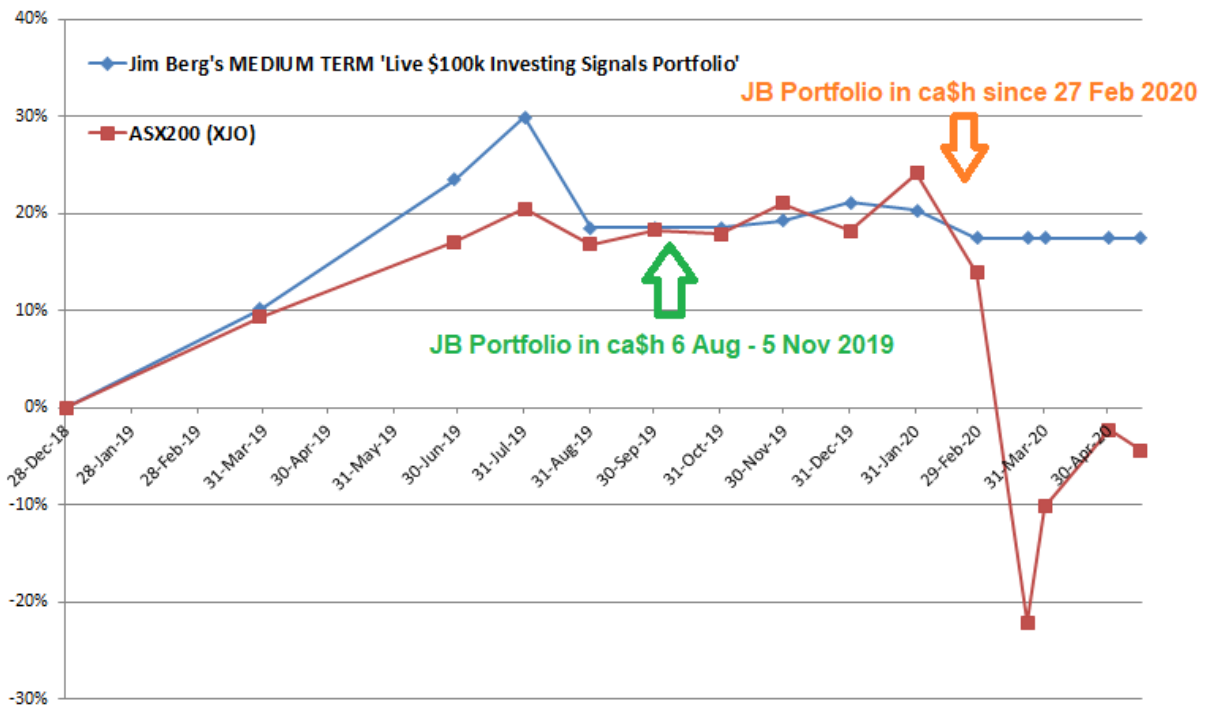
#### Jim Berg's Live \$100k Medium Term Investing Portfolio vs ASX200 (XJO)

ASX200 (XJO)	Increase	Date	Jim Berg's Medium Term 'Live \$100k Investing Signals Portfolio'	Increase	Outperformance: JB Medium Term \$100k Live Investing Signals Portfolio
5654.32	0%	28/12/2018	\$100,000	0%	0%
6180.73	9.3%	29/03/2019	\$110,173	10.2%	0.9%
6618.77	17.1%	28/06/2019	\$123,506	23.5%	6.4%
6812.6	20.5%	31/07/2019	\$129,871	29.9%	9.4%
6604.21	16.8%	31/08/2019	\$118,498	18.5%	1.7%
6688.35	18.3%	30/09/2019	\$118,498	18.5%	0.2%
6663.37	17.8%	31/10/2019	\$118,498	18.5%	0.7%
6846.00	21.1%	29/11/2019	\$119,266	19.3%	-1.8%
6684.08	18.2%	31/12/2019	\$121,149	21.1%	2.9%
7017.22	24.1%	31/01/2020	\$120,318	20.3%	-3.8%
6441.21	13.9%	28/02/2020	\$117,429	17.4%	3.5%
4402.5	-22.1%	23/03/2020	\$117,429	17.4%	39.6%
5076.83	-10.2%	31/03/2020	\$117,429	17.4%	27.6%
5522.25	-2.3%	30/04/2020	\$117,429	17.4%	19.8%
5404.81	-4.4%	15/05/2020	\$117,429	17.4%	21.8%

\* 1. 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. STE's service, like all other financial services, is subject to market forces and unpredictable events that may adversely affect its future performance.

2. Details of Jim Berg's Entry, Management and Exit Rules for both Investing and Trading are excluded here. They are presented in full in to [Report Members](#)

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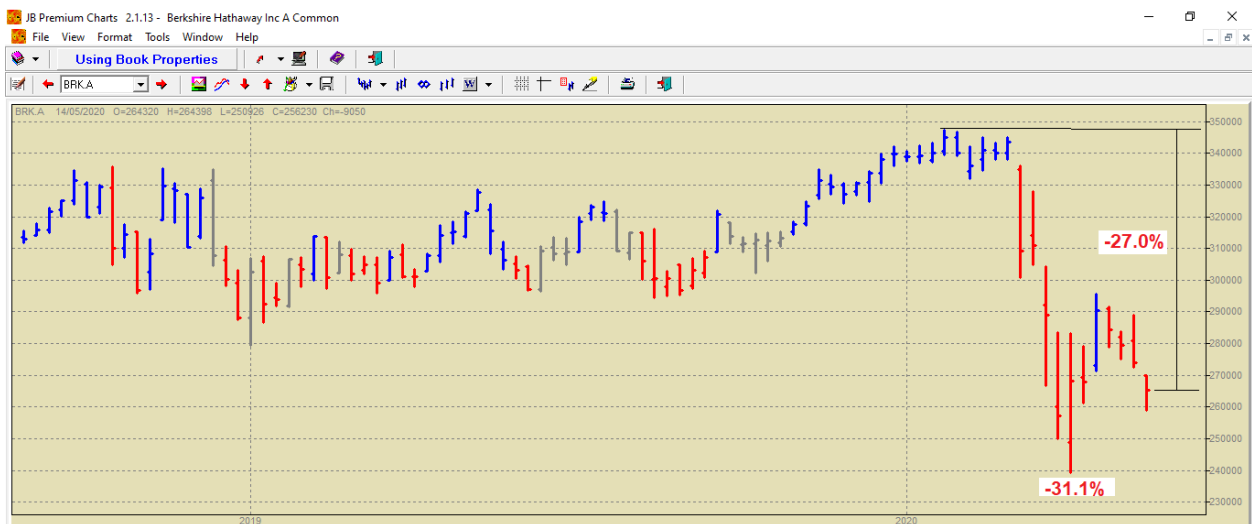


Jim's notional Investing Signals Portfolio was in **ca\$h\***:

- ✓ Between 6<sup>th</sup> August 2019 and 5<sup>th</sup> November, during the USA/China trade war volatility
- ✓ And again since 27<sup>th</sup> February 2020, so it avoided and was insulated from the extreme and financially damaging falls in March 2020

As a result, since it commenced on 28<sup>th</sup> December 2018 to the Close on Friday 15<sup>th</sup> May 2020, Jim's Investing Signals Portfolio **outperformed the ASX200** by **+21.8%** and at the Low on 23<sup>rd</sup> March, by **+39.6%**.

In comparison, the daily chart and Table below show Warren Buffet's Berkshire Hathaway Inc A (**BRK.A**) Fund performance over the same period:



Berkshire Hathaway Inc A (**BRK.A**) weekly chart 2018 to 2020

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Berkshire Hathaway In. A (BRK.A)			
Date	Stock Price	Change since 28/12/18	Fall since 20/2/20
Close 28/12/2018	\$ 302,600	-	
High 17/1/2020	\$ 347,400	14.8%	-
Low 23/3/2020	\$ 239,440	-20.9%	-31.1%
Close 15/05/2020	\$ 253,501	-16.2%	-27.0%

In particular, Warren Buffet's Fund:

- ✚ By the Low of 23<sup>rd</sup> March 2020, had fallen **-31.1%** from its January 2020 High
- ✚ As at Friday's Close, had fallen **-27%** since January 2020
- ✚ Overall, since 28<sup>th</sup> December 2018, was down **-16.2%**
- ✚ In comparison, Jim's notional 'Live \$100k Investing Signals Portfolio' was in **ca\$h** with locked in notional profits of **+17.4%**.

I.e. Jim's Live \$100k [Investing Signals](#) Portfolio currently **outperforms** Warren Buffet's Fund by (17.4% +16.2%) = **+33.6%**. Again, these results bust the myth "Time in the Market is more important than Timing the Market".

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**Also in this Week's Edition of the 'Investing & Online Trading' Report:**

*"Second to None"*

I have been a member of Jim and John's 'Investing & Online Trading' stock market Report for many years and will continue to be a member for the foreseeable future.

In my opinion the advice given in this weekly Report and its trading education is second to none.

Thank you for this high quality newsletter. I only wish I had known about it years before!

Stephen Dunn, private trader,  
Melbourne, Vic. May 2020

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  - When to SELL? And
  - How to trade falling markets?
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"Because of your newsletter I did go to cash with most of my money. So a huge thanks!"

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Your knowledge and ability to get us out at the appropriate times is uncanny.

Because of your newsletter I did go to cash with most of my money. So a huge thanks!



Going solo is a necessity to hone and develop ones skills, but staying within a community of like-minded professionals allows one to utilize their knowledge and enhance your learning to become a better trader and investor.

Many thanks

Adrian Tench, Private Investor,  
Rivervale, WA , March 2020



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