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Australian 'Super 10 ETF Signals Portfolio' Update By John Atkinson and Jim Berg

1. What is an ETF?

" An ETF is a type of investment fund that can be bought and sold on a securities exchange market. In Australia, ordinary ETFs are 'passive' investments that track an asset or market index (for example, the ASX200 Australian share index). They generally do not try to outperform the market and will go up or down in value in line with the Index they are tracking.

ETFs are available for a broad range of assets including Australian shares, international shares, fixed income products, foreign currencies, precious metals and commodities. They can be used as a way to diversify your investment portfolio, and usually have lower fees than a traditional managed fund." *

(* Please refer to [ASIC's website](#) for more details, including Physical ETFs, Synthetic ETFs, Active ETFs and ETF specific risks).

The following extracts are from Betashares annual Report:

' The Australian ETF industry smashed through the \$60B milestone and ended the year at \$61.8B, an all-time high, and a full 52% higher than its level as at the end of 2018 (\$41B).

The change in total industry size for the year was \$21B which is by far the highest annual change on record.

Unquestionably the industry was assisted by strong asset value appreciation, but nonetheless~60% of the year's industry growth came from net inflows, with \$12.9B flowing into the industry over the course of the year.

This represents by far and away the highest annual inflows on record, and, in fact, represents a 65% increase on the previous annual record (which was in 2017).

The industry broke other records in addition to those described above, with ETF Trading activity levels reaching a fresh record high, with trading value increasing 38% compared to 2018, and over \$50B of value traded...."

2. More ETF Background

Here is some more info. on Exchange Traded Funds (ETFs):

1. ETFs can be bought and sold simply, just like shares and on the same trading platforms
2. Unlike real estate, there are no large legal fees, stamp duties or LMI loan fees on settlement and if you need cash at any time, you do not have to sell the whole investment
3. Similar to shares, many ETFs pay dividends, which allow extra yields to be added to capital growth
4. Generally, ETFs are NOT stock specific - they are typically spread across many components. As a result, they tend to be less volatile than individual shares.

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5. There are over 250 ETFs to choose from in Australia.
6. Originally, ETFs were based on key Indices. e.g. ASX200, S&P500 etc. With the ever increasing range of ETFs, Australians can now invest in many markets, including global banks, emerging/Asian/European markets, global health and many more - without the need to leverage, open international accounts or worry about exchange rates.
7. The addition of ETFs can be regarded as a natural progression for those investors and traders (e.g. after they have learnt how to trade shares safely and wisely) -- as another "string to their bow" as an additional income stream for creating wealth.

3. 'Super 10 ETF Signals Portfolio': 2019 in review

At our website we currently have 3 '[Done-For-You Signals Services](#)' * in which we provide Entry and Exit signals for our Members into Australian shares and ETFs which must be in **rising trends** at the end time of entry, with an aim to "minimise losses and let profits run".

One of these services is our notional '[Super 10 ETF Signals Portfolio](#)' which is structured slightly differently from the Signals for [trading](#) and [investing](#) in Australian shares.

In addition to providing Entry AND Exit Signals, in this notional ETF Portfolio we:

1. Select and monitor a set number of 10 Exchange Traded Funds (ETFs)
2. Monitor them daily and provide **on-going suggested maximum entry prices** and Stop loss values *for the benefit of those Members who join later*.

Over the last year we found:

1) Several ETFs were trending nicely but were stopped out at small losses in late 2018 and again in mid 2019*. Most of these were caused by the USA/China Trade War rhetoric which saw many stock and ETF prices fall around the world.

E.g. in 2018 the USA had the worst pre -Xmas correction since 1931, the biggest fall ever on Christmas Eve, then in 2019 the worst start for a year since 2000.

2) Our rules in this Report centre on entering shares and ETFs only when they become rising trends - yet most ETFs on our watch list had switched to **falling trends** after these falls.

They subsequently rebounded in V shaped recoveries - but as they were still within **falling trends**, no ETFs could be entered until they switched back to **rising trends**, by Jim's structured definitions as part of his '[Weight-of-Evidence](#)' principles.

3) Then, in August 2019, due to further increased trade war induced volatility, we elected to close our hands on '[learn-by-doing](#)' [Investing & Online Trading Report's](#) notional portfolio and all open trades in our [3 Signals Services](#) and sit to one side until " *volatility returned to normal* ", by Jim's documented definitions.

Jim subsequently announced that this occurred on 1 November 2019. Since that date, we have re-opened and now re-filled the notional Medium term ETF Portfolio.

4) While each individual ETF trade loss was kept small, cumulatively they totalled \$4.1k i.e. a drawdown of 4.1% on the notional \$100k portfolio. From the above, this notional ETF portfolio was also in '*cash*' for much of the year due to increased volatility from the trade war, so the net result was that it took the rest of the year to return to breakeven.

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5) Meanwhile, separately in our mentoring-style '[Investing and Online Trading Report](#)' during 2019 our extensive '*Gamechanger*' testing of shares for '*longer term investing*' has shown that using monthly charts and waiting for either a trend reversal for each share or for monthly stops to be triggered tends to work well in trending markets.

This is primarily because these monthly Stops are set lower from the '*noise*' of the market.

6) As a natural progression, in the last few weeks, for our [ETF Signals Members](#), we have now added a SECOND notional ETF portfolio of 10 ETFs, managed with **monthly charts**. I.e. this is **IN ADDITION** to the existing one, managed with *weekly charts*.

Some ETFs will be the same in both notional portfolios and managed with Stops from the 2 time frames, while other ETFs will be different.

The following table show the status of the 10 'open' \$10k ETF positions in these 2 notional \$100k ETF Portfolios which we are now monitoring*:

ETF Signals Portfolios: Open Profits as at 17 Jan 2020		
	Since 1/11/19	Since 28/11/18
	Medium Term ETF Portfolio	Long Term ETF Portfolio
No of ETFs in Open Profit	10	10
No of ETFs in Open Loss	-	-
Max Open Profit	8.9%	31.9%
Max Open Loss	-	-
Av. Open % Profit (incl divs)	5.9%	12.7%
Av. Open % Loss (incl divs)	-	-
Total Open Profit (incl divs)	\$ 5,937	\$ 12,724
Total Open Loss (incl divs)	-	-

For both these notional Medium Term and Long term [ETF portfolios](#), each weekend we continue to update:

- ✓ The closing prices
- ✓ The Stop Loss types (using weekly or monthly charts as applicable)
- ✓ The Stop Loss values
- ✓ Our suggested maximum entry price for each ETF within these 2 portfolios, for those [Members joining now](#).



For example, following rallies in most of the ETFs last week, on Friday 17th Jan we raised stops and increased the suggested entry prices for 12 of the 20 open positions within these 2 notional ETF Portfolios.

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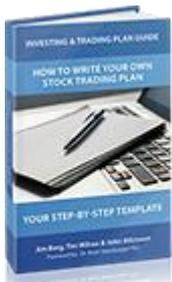
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