



This Wrap, from JDL Strategies and ShareTradingEducation.com, is based on an extract from the latest Edition of Expert Trader & Investor Jim Berg's Mentoring- Style 'Investing & Online Trading' Stock Report

'Buy & Hold' or Time this Market?

By Jim Berg and John Atkinson

1) Introduction

In Edition 505 of our [weekly Report](#) of 28 March 2015, Jim Berg posted his first Warning Signals article regarding the USA Market. He has progressively updated the charts from that article several times since. In Edition 511 of 9 May 2015, Jim posted his first 2015 Caution notice for the Australian market too.

As a result of these Caution warnings, Jim gradually wound back notional positions as their stops were triggered/targets achieved and ceased adding new 'long' positions to our Report's notional portfolios and [Signals Service](#), then switched to trade the downside as these markets fell.

Since then, some markets have fallen substantially. Those Members who followed Jim's lead switched to cash and protected their funds.

Those who missed Jim's warnings or listened to their advisor's advice to 'Buy and Hold for the Long term' may have watched their portfolios over the last year, some quite significantly, particularly if they were holding bank or resource stocks.

We are aware that some Report Members like to look for shares which continue to trend upwards when the market is falling. While this tactic is contrary to Jim's conventional approach, in Edition 547 we introduced a series of articles on our latest research (*as it happens*) on how to find *shares* when the ASX200 Index is in a Falling Trend.

Our aim is to see if there is a way to "swim upstream against an outgoing tide", without being smacked in the face by too many "...dead fish coming in the opposite direction...." We stressed at the outset that we do not know what the final outcome will be, so we will all learn together.

2) Background

Trading a **falling market** is not easy. Most investors want to buy something of value and sell when it increases in value. And bear markets can be extremely frustrating. There are far fewer securities to trade and volatility can test the patience of even the most seasoned investors.

In addition, some of the largest price rises and consecutive positive days occur when the **Index** is in a falling trend.

Buying opportunities are also rarer as fewer securities are in a rising trend. So we need to look at a few different strategies for investors that only want to trade from the buy side.

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Usually Jim would only look for shares in a rising trend having first checked that the overall market is also in a rising trend. In this research project we are purposefully looking for rising shares to buy in a falling trend, so this overall market check is intentionally set aside.

However, if any particular share switches from a rising to a falling trend at any time, then no further potential entries are regarded for this research, until after it switches back to a rising trend.

Every month since mid-2015, Jim now provides our [Report Members](#) with a '**Momentum Picks**' List.

Each Watch List consists of a number of Companies for Members to watch over the next month and see which, if any, provide a confirmed Entry Signal, based on Jim's proven '*Weight-of-Evidence*' strategies.

Jim uses the following filtering criteria to filter the market and create his '*Momentum Lists*:

- ✓ Included in **ASX300 Index**
- ✓ 12-month price appreciation
- ✓ Meet 'most' of Jim's fundamental criteria (using [OracleSCAN](#))
- ✓ **Consensus Recommendation** of **Buy** or **Outperform** (using [OracleSCAN](#))

Every week, in our latest series of articles, Jim now works his way down previously posted '*Momentum Picks*' Lists and analyses 2 to 3 companies in turn. For each company, Jim shows:

1. The weekly chart, confirming how they were in a rising trend at the time he originally produced the List
2. The subsequent chart with later price action, including whether they switched to a **falling trend** since
3. Details of all possible trades while they were in a **rising trend**, including entry date & price, reason for exit trigger, exit date & price and profit or loss result

3) This Week's 3 '**Momentum Picks**' Companies

In this week's Edition 559 of our '*Investing & Online Trading Report*' Jim analysed the final three Companies from his June 2015 '**Momentum Picks List**'. For this Wrap we will call them *Stocks 1, 2 and 3***.

Of those:

- 1) **Stocks 1 and 3** were already in a **falling trend** at that time or the following month. They did not trigger entry Signals using Jim's documented Rules, so were discarded from the analysis
- 2) **Stock 2** was and remains in a **rising trend** and gave 3 entry signals potential trades since June 2015, as follows:

{** **Please Note:** Stock codes and details of Jim Berg's Trading Rules are excluded from extract Wraps. They are presented in full to subscribing [Report Members](#).}

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Stock 2 Entry Signal #1

Stock 2 daily chart gave the first JB 'Alert' and Blue Bar Volatility entry signal in September 2015.



Stock 2 Daily Chart Entry #1*

Action: Trailing Stop Exit with a + 6.6 % profit.

Stock 2 Entry Signal #2

Stock 2 daily chart gave a 2nd JB 'Alert' and Blue Bar Volatility entry signal in October, 2015.



Stock 2 Daily Chart Entry #2*

Action: Exit at profit target with a + 15.3 % profit.

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Stock 2 Entry Signal #3

Stock 2 daily chart gave a **JB 'Alert'** and **Blue Bar Volatility** entry signal in February, 2016.



Stock 2 Daily Chart Entry #3*

Action: Trailing Stop Exit with a **- 5.7 %** loss.

4) Buy & Hold or Time the Market? Summary Comparison

Stocks 1, 2 and 3 gave 0, 3 and 0 entry Signals respectively since Jim's 'Momentum Picks List' was produced for June 2015. Table 1 below summarises the short term trading Results using daily charts for this week's 3 'research' entries:

TABLE 1

Jim Berg's 'Momentum Picks Trading'									
From Momentum Picks List for:					Jun-15				
Previous Potential JB Volatility Trades:									
Company	Trade No	Entry			First Exit* - Using DAILY Charts				
Stock 1	Edition No.	Entry #	Entry Date	Entry Price	Exit Trigger*	Exit Date (or Current Date if Open)	Exit (or current) Price	Time in Trade (weeks)	Notional Result %
	559	Nil							
							Average	0.0	0.0
Stock 2	Edition No.	Entry #	Entry Date	Entry Price	Exit Trigger*	Exit Date (or Current Date if Open)	Exit (or current) Price	Time in Trade (weeks)	Notional Result %
	559	1	1/09/2015	\$1.21	Trailing Stop	5/11/2015	\$1.29	9.3	6.6%
	559	2	29/10/2015	\$1.31	Profit Taker	23/11/2015	\$1.51	3.6	15.3%
	559	3	17/02/2016	\$1.41	Trailing Stop	14/03/2016	\$1.33	3.7	-5.7%
							Average	5.5	5.4%
Stock 3	Edition No.	Entry #	Entry Date	Entry Price	Exit Trigger*	Exit Date (or Current Date if Open)	Exit (or current) Price	Time in Trade (weeks)	Notional Result %
	559	Nil							
							Average	0.0	0.0

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Jim Berg trades with '*Weight-of-Evidence*', such that he needs all of his Entry Rules to be in place in order to '*line up all the ducks*' before he opens a position.

The first part of those Rules is that the share must be in a **rising trend**. For instance, this week's study of 3 Companies from the June 2015 Momentum List has shown that:

- a) One (**Stock 1**) was discarded from the analysis at the start as it was in a **falling trend**
- b) Another (**Stock 2**) switched to a **falling trend** within a month and did not give an entry signal prior, so was also discarded
- c) Only 1 of the 3 Companies (**Stock 2**) was in a **rising trend** and gave 3 entry and exit signals since June 2015, so that is the only Company of interest this week

The reason that Jim waits for a Company to be in a rising trend is that he wants to increase the balance of probability of selecting profitable trades.

To manage his open positions, Jim then has a set of documented rules to exit, using his:

- ✓ Initial, Adjusted and Trailing Stops
- ✓ Profit target and Jim's
- ✓ JB Profit Taker.

Jim's Stop Losses are designed to provide traders and investors with an exit trigger to either:

1. Lock in profits or,
2. Limit losses, if positions go against them, so that their capital is protected and they are not left holding on to falling shares if the market plummets further -- and left living on '*hope*'.

In comparison, many so analyst '*experts*' recommend Companies to buy based on their fundamentals only, or if they have fallen significantly in price and they say they now present '*better value*'. This is a popular mantra being chanted currently and over the last year by a number of so called '*experts*' e.g. after resources and banks have fallen so far.

If they are right and prices rebound from here and later become a rising trend, then they will pat themselves on the back.

However, if they are wrong, then after prices fall further, many of these experts do not notify sell instructions - rather, many recommend later that their clients "*buy some more*", as the Companies by then will "*represent even better value*"!

Those clients who respond to such catchcries end up custom fitting a set of concrete boots to their portfolioas they watch it sink further and further into the abyss.

For example, many such investors have a long way to recover from the losses in the GFC after the market peaked in late 2007. Many have been forced to change their dates and plans for retirement as a result.

As an example of how important this can be, let's now compare the hypothetical portfolios of

1. Investor '*Buy and Hold*' with a \$100k portfolio who '*invests*' \$12,500 on Monday 15th June 2015 into each of the 3 Companies listed today from the June 2015 Momentum Picks List - and holds them until Friday 15th April 2016, with the balance in cash.....

Vs....

2. Trader '*Weight-of-Evidence*' with a similar \$100k portfolio, who rejects Companies in a falling trend, looks for Jim Berg's Volatility Entry Signals in Rising Trends only and acts with discipline when one of Jim's exit triggers appears

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Table 2 below compares what their portfolios would look like now:

TABLE 2

COMPARISON: Investor BUY AND HOLD vs Trader 'Weight of Evidence'								
<i>On 3 Final Companies from Jim Berg's June 2015 Momentum Picks List</i>								
a) Scenario 1: Investor 'Buy and Hold'								
Stock 1	Entry Date	Entry Price \$	Value as at 15/6/15	Price as at 15/4/16	Value as at 15/4/16	P/L in Value	P/L %	Weeks in trade
Stock 1	12/06/2015	\$3.69	\$12,500	\$2.33	\$7,893	-\$ 4,607	-36.9%	44
Stock 2	12/06/2015	\$1.21	\$12,500	\$1.29	\$13,326	\$ 826.4	6.6%	44
Stock 3	12/06/2015	\$1.40	\$12,500	\$0.95	\$8,482	-\$ 4,018	-32.1%	44
TOTAL			\$37,500		\$29,702	-\$ 7,798	-20.8%	
a) Scenario 2: Trader 'Weight-of Evidence'								
Company	Entry Date	No of trades	Value as at 15/6/15	Ave Profit per trade	Value as at 15/4/16	P/L in Value	P/L %	Total Weeks in trades
Stock 1	n/a	0	\$12,500		\$12,500	n/a	n/a	n/a
Stock 2		3	\$12,500	5.4%	\$14,525	\$ 2,025	16.2%	16.6 (See Table 1)
Stock 3	n/a	0	\$12,500		\$12,500	n/a	n/a	n/a
TOTAL			\$37,500		\$39,525	\$ 2,025	5.4%	

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Table 2 above shows that, excluding dividends and transaction costs:

Scenario 1: Investor 'Buy and Hold' of all 3 Companies, with disregard to charts:

- Has had 3 open positions exposed to the market for 44 weeks since June 2015
- Has one open profitable position of **\$826**, or **+6.6%** on that \$12,500 position
- Has 2 open losing positions of **-32.1%** and **-36.9%**
- Is sitting on a total open loss of **-\$7.8k**, i.e. **-20.8% LOSS** on the \$37,500 originally 'invested'

In comparison, by timing the market, using Jim Berg's proven strategies:

Scenario 2: Trader 'Weight-of Evidence':

- Rejected 2 of the 3 possible Companies, as they did not pass Jim's 'Weight-of-Evidence' rules, so
- The equivalent of 2 x \$12,500 = \$25k extra cash would have been protected out of the market over the last 44 weeks
- Traded only 1 Company and on 3 occasions, totalling 16.6 weeks between those 3 trades (Table 1)
- Had a net average of **+5.4%** for each of those 3 trades (after 1 loss—see Table 1) i.e. a total profit of **\$2.03k** on the 3 x \$12,500 positions assigned to that Company
- Has no open positions, with closed profits of **\$2.03k**, i.e **+5.4% PROFIT** on the original \$37,500 allocated
- This is an outperformance differential of **5.4% -(-20.8%)** i.e. **26.2% more** on the \$37,500 allocated compared with Investor 'Buy & Hold'

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5) Where to From Here?

As part of our regular mentoring-style '[Investing & Online Trading Report](#)' series of articles, we plan to continue:

1. Posting Jim Berg's '*Momentum Picks*' each month to help our Members find shares to trade in rising trends while the overall market is in a falling trend.
2. Progressively publishing Jim's analysis of 2-3 Companies each week from his previous Momentum Picks Lists in a similar format as presented here today – to help our members learn how to time the market

In addition, in his [Australian Signals Service](#), Jim has recently added a new '**rising shares in falling markets**' sheet, in which he:

1. Notifies Signals Members each night of any new '*Live*' JB Volatility Entry Signals by any Companies from his most recent '*Momentum Picks*' Lists
2. Also each night, Jim monitors all '*open*' Signals Positions, updates Stops and current Prices in their '*Master Logs*', then emails Signals Members to notify if any '*open*' positions have:
 1. Switched Stop types, e.g. from an Initial to Trailing Stop, or
 2. Triggered an exit Signal, by Jim's Rules.

Jim is now looking to add more Signals in coming weeks.



(For more info. [Click Here.](#))

If markets manage to climb from here - enough to switch from a falling trend to a rising trend, then Jim will advise Members of this overall market RE-ENTRY Signal - **just 1 day after it occurs.**

However, if markets fall further, portfolio values are likely to follow, which will mean such investors will be faced with the need to **rebuild** their wealth later, after the market finally rebounds.

For instance, to date, the XJO has a long way to climb back before it resumes its 2007 Highs.

As a result, many investors who listened to these '*experts*' advice last time have still yet to recover from the GFC, while several have also been forced to change their plans for retirement.

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You now have the choice to follow those 'experts' and fundamental analysts who advise their clients in this and other Bear Markets to:

- i) "Buy the dips"
- ii) "Dollar cost average" and
- iii) "Focus on dividend income"

Or you can choose to:

1. Stay in cash and wait for a rising trend then build upon locked-in capital and profits (*instead of trying to rebuild from a lower position*)

AND

2. [Members of our Report](#) can follow the education provided in our mentoring-style Report each week on how to trade and invest in:
 - i) Falling markets with non-leveraged Inverse ETFs - which are bought and sold like shares *AND*
 - ii) *Rising* shares in *falling* markets
3. As a [Member](#), you can also participate in our:
 - a. Weekly 'Stock of the Week' and 'How to Filter a Watch List' exercises on paper, then compare your results with Jim's own analysis the following week
 - b. **NEW!** We recently announced the launch of Jim Berg's 12 new E-Classes - to help you [Learn how to trade and invest with confidence in just 12 weeks*](#).

By the end of your first 12 weeks, our aim is for you to learn how to select WHICH shares to buy, precisely WHEN to Buy and, most importantly, to know WHEN to SELL with confidence.

These 12 new E-Classes and our mentoring-style 'Investing & Online Trading Report' are all designed to:

- A.** Help you hone your trading and investing skills and
- B.** Build your confidence and abilities

so you will be best prepared **to take maximum advantage of the next rising trend.**

**Learn How to Trade & Invest
in 12 WEEKS with Jim Berg's
12 E-Classes...**



*** To Celebrate the Release of Jim Berg's 12 New E-Classes:**

Become a Member of Jim's mentoring-style 'Investing & Online Trading Report' today

and you will also receive Jim's 12 new E-Classes ([\\$586 value](#))

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"Now Only 1 Week Before Jim Berg's FINAL 2016 Trading Academy"



There is now **only 1 week** before Jim Berg's Main Event for 2016, his once-a-year weekend Trading Academy, starting on Friday 29th April, suitable **for beginners through to seasoned traders and investors**.

Here you will learn all the intricate 'nitty-gritty' details of how to use Jim's proven 'Weight-of-Evidence' approach and his JB Volatility Indicators - for both short term trading and longer term investing.

Now is the right time to 'sharpen your axe'. Attend Jim Berg's weekend Trading Academy with a group of like-minded traders & investors to learn and fully understand & cement, **step-by-step**, each of the steps of Jim's proven 'Weight-of-Evidence' process



Hi,

"The weekend was very stimulating.... Everything was amazing. It felt more like I was invited rather than paying to come.

The four of you made us feel as though nothing was too much trouble. Such attention to detail in every area and lovely friendly family atmosphere.

You did a great job of providing clarity when we needed help to understand some of the more complicated material, and all questions were answered with kindness and respect. Thank you again for a lovely weekend."

Lesley, Brisbane Private Trader, May 2015

Money and Risk Management will be covered and help provided to **create your own profitable Trading and Investing Plan**. In addition, you will also receive:

- ✓ Jim Berg's complete Home Study Course before you attend
- ✓ 2 lunches, morning & afternoon refreshments, Meet and Greet reception Friday night and Networking dinner & drinks Saturday night
- ✓ HD videos of the weekend - for you to replay in the comfort of your home and
- ✓ 12 months email support- direct from Jim Berg
- ✓ Member, Graduate and Partner/friends savings of **43%- 66%** available

After 10 years of hosting his popular weekend workshops, Jim Berg has decided that this year's event will be his **final Trading Academy**, so this is your **LAST CHANCE** to benefit from Jim's unique hands-on 'Learn-By-Doing' experience.



As a valued JDL Client, you can secure your seat with a **43% Savings** and a **66% savings** for your partner/friend or family member accompanying with you.

To claim your savings, simply enter **"JDL CLIENT"** in your order template under 'Special Instructions'. **[For more info Click Here Now==>](#)**

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