

2020 Two-Day Investment Seminar

**Track 1: Retirement Investing for Steady,
Consistent Growth & Income**

**Track 2: High Probability Trading Techniques
for Increased Profits**



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VectorVest Product Descriptions

VectorVest 7 - VectorVest 7 comes in three formats; End of Day, IntraDay and RealTime for U.S. and Canadian markets. Additional End-of-Day markets include: Australia, Europe, Hong Kong, Singapore and United Kingdom. VectorVest 7 analyzes, sorts, ranks and graphs thousands of stocks using an advanced, user-friendly platform that is highly customizable. VectorVest 7 provides Buy, Sell and Hold recommendations on every stock, every day and a complete analysis using more than 40 technical and fundamental indicators. Most importantly, it gives you market timing updates for precise trading entry and exit points so you can consistently buy low and sell high. The program may be installed on multiple computers for convenience.

VectorVest RealTime Derby - The VectorVest 7 Derby works with VectorVest RealTime to offer a revolutionary, new approach to real-time trading. It runs over a hundred and eighty strategies simultaneously to immediately identify the best performing strategies at any given moment of the day. The Derby ToteBoard analyzes and compiles the results in four different analysis modes - day trading, Buy and Hold, Vary the Start Date and Sliding Window to point you straight to the most consistent, money making strategies for your trading style. You can add The Derby to your subscription for \$99/month or \$1,095/year.

VectorVest RoboTrader - Eliminate Emotions from Your Trading - What if you could trade your plan the way it was intended? This powerful tool makes it much easier to manage your portfolio by keeping your emotions out of the way—improving your investment success. RoboTrader watches your portfolio around the clock, in real-time, so you don't have to devote your time and attention. When it's time to make a trade, RoboTrader will send you an alert. Simply approve the trade and RoboTrader will place it with your broker directly from VectorVest. **Includes AutoTimer FREE!** You can add RoboTrader to your subscription for \$99/month.

VectorVest ProfitLocker Pro - This is America's fastest, smartest, trading stop. It's like a floating Stop that leaves a lot of wiggle room when it's well below the Target Gain and tightens as it gets closer to the Target Gain. It will lock in your profit if and when the stock starts going down. You can see what ProfitLocker Pro is doing and customize it on the fly... or you can let it do its thing and go fishing. It will always seek the maximum profit. There's nothing else that can compete with it! \$99/month

VectorVest Super WatchDog - Let your computer look through hundreds of charts for the setup you want! Super WatchDog alerts you when new stocks are returned in a VectorVest built-in search, even when you're away from your computer. Super WatchDog also combines VectorVest searches with MACD and Support and Resistance scans to monitor, alert and document the stock picks you want to see. You're in control with selectable alert sensitivity—dial in how many alerts you want. \$99/month

VectorVest OptionsPro - This sophisticated options platform integrates seamlessly with the power and performance of the VectorVest system to help you quickly identify optimal options trades in real-time. I'm confident that this brand-new money-making resource will not only save you tons of time, but also deliver a significant boost to your bottom line. You can add OptionsPro to your subscription for \$249/month or \$2,795/year.

VectorVest ProTrader v7.0 Searches - ProTrader 7 Searches run over 28 built-in technical searches, which can be easily customized, or point-and-click to build your own. If you're tired of searching through endless charts looking for that golden opportunity, ProTrader 7 Searches is the tool for you! Available for a one-time fee of \$495* or **FREE with a subscription to VectorVest RealTime**.

VectorVest Options Analyzer - The VectorVest Options Analyzer accesses the VectorVest database and allows you to verify and examine the Profit/Loss implications at expiration of options trades. It also allows you to perform sensitivity studies of all the factors affecting the option premiums prior to expiration. It is perfect for back-testing ideas and for assessing potential option trades. Available for a one-time fee of \$495.

VectorVest AutoTimer - AutoTimer's awesome backtesting capabilities help you create and refine your winning plan - then put your trading plan into action with the Portfolio Genius. AutoTimer can be used in historical mode to create, test and refine your perfect automated trading system, complete with market timing, stock selection, stop criteria and a host of other money management options. AutoTimer can also be used as a sophisticated paper trading tool. Used in conjunction, the Genius + AutoTimer sends alerts when it's time to make a trade. Available for a one-time fee of \$495 or **FREE with a subscription to VectorVest RealTime**.

VectorVest WatchDog - VectorVest's WatchDog monitors the entire market or your selected WatchLists to instantly alert you to specific technical signals. Choose from MACD or Support & Resistance criteria and receive alerts in the software, as well as by email/text message, so you never miss a potential trade again! Available for a one-time fee of \$495* or **FREE while subscribed to VectorVest RealTime**.

The Options Paycheck (LIVE - Feb. 2020) - How to generate safe, monthly income using options in any market. This seven-week course includes a complete, step-by-step roadmap to monthly income. We will guide you through our exact, detailed Option Income System... the same system we use to target 3% per month in income. We'll take you from building a foundation in trading options to trade management—proven repair techniques and trade execution. ~~\$1,990~~ Only \$995.

The Options JumpStarter (Home-Study Course) - A complete step-by-step system that shows you how to buy Calls & Puts to profit in both up & down markets. We will take you by the hand and guide you through the **EXACT step-by-step Option Profit System** you need, so you can leverage your money with options. In the next 6-weeks, you will be able to confidently find, set-up and manage the right option trade at the right time to make money whether the market is going up or down. If you're new to options or have struggled with them in the past, this is the course for you. ~~\$495~~ Only \$295.

Trade Like A Pro Course Videos (Home-Study Course) - Master the highly successful techniques of world-famous professional traders. No guesswork. No confusion. Just precision trading with the best low-risk, high probability set ups you'll find anywhere. Proven techniques, live trading and step-by-step instruction from the planning stage...through execution...all the way to closing the trade and collecting your profits, make this course a must-have for every trader wanting professional level results in a fraction of the time. ~~\$2,995~~ Only \$2,495.

Opening General Sessions – January 10th

- 09:00 AM Welcome & Course Introduction
- 09:20 AM How the Market Works
- 10:15 AM Break
- 10:30 AM The VectorVest System of Analyzing &
Ranking Stocks
- 11:15 AM Market Direction is Your Key to Achieving
Consistent Performance
- 12:00 PM Served Lunch

Breakout Sessions – January 10th

Retirement Track

01:00 PM How to Make Money with VectorVest

01:45 PM When to Buy

02:30 PM Break

02:45 PM What to Buy

03:30 PM When to Sell

Trader Track

01:00 PM The Anatomy of a Swing Trade

01:45 PM How to Use Top Technical Indicators

02:30 PM Break

02:45 PM Swing Trading the VV Derby

03:30 PM Trading System Automation

Breakout Sessions – January 11th

Retirement Track

09:00 AM Understanding
the Importance of industry &
Sector Rotation

09:45 AM Using UniSearch
to Enhance Performance

10:30 AM Break

10:45 AM Automating Your
Portfolio

11:30 AM Situational
Investing

Trader Track

09:00 AM How to Find Hot
Stocks

09:45 AM Asset Allocation
& Risk
Management

10:30 AM Break

10:45 AM How to Reduce
Risk and Increase Profits

11:30 AM Options Trading

Closing General Sessions

01:15 PM Ultimate Retirement Solution

02:15 PM Putting It All Together

Day One

Morning Session

Opening General Sessions

How the Market Works

9:20 AM – 10:15 AM

How the Market Works

What causes Bull and Bear Markets?
and
When do they Begin and End?

How the Market Works

The Efficient Market Theory

States that all market participants receive and act on all relevant information as soon as it becomes available.

How the Market Works

Relevant Information

is any Economic, Financial, Political, Geopolitical News or anything else, e.g., new products, that Cause Share Prices to Rise or Fall.

How the Market Works

The Efficient Market Theory

Implies that it is impossible “to beat the market” since all relevant information is efficiently incorporated and reflected in share Prices.

How the Market Works

The Efficient Market Theory

Compels market participants to get relevant information sooner than anyone else and implement it faster than anyone else.

How the Market Works

Thomson Reuters delivers
U of Michigan Consumer Sentiment Survey
on a Preferential basis:

The data is released to elite clients at **9:54:58am**,
to regular paying customers at **9:55am**,
and to the general public at **10:00am**.

How the Market Works

How Does the Average Investor
Cope with this Situation?

How the Market Works

Look at the Big Picture

Stock prices **rise** whenever the news implies that
the economy is improving, and earnings are
rising.

How the Market Works

The Big Picture

All Relevant Information
is manifested by changes in
Earnings, Inflation and Interest Rates.

S&P500 vs. Earnings



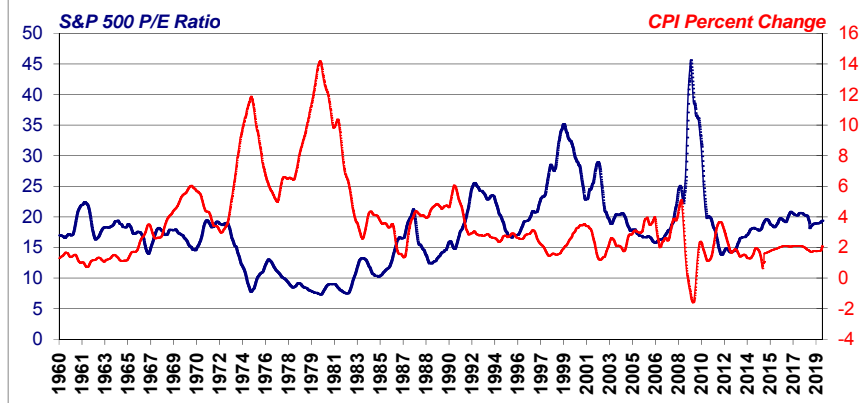
How the Market Works

Earnings

Stock Prices **increase** with
Rising Earnings.

How the Market Works

S&P 500 P/E vs. CPI: Jan. 1960 to Dec. 2019
(20-week average)

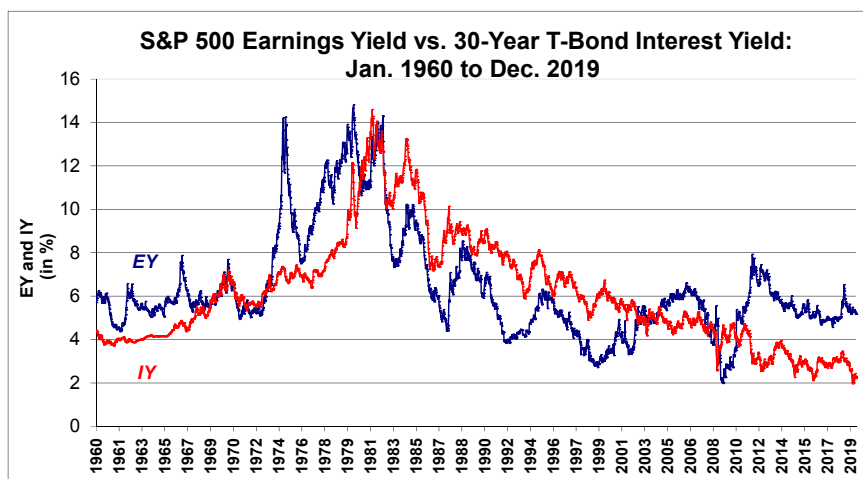


How the Market Works

Inflation

Stock Prices **decrease** with rising
Inflation Rates.

How the Market Works



How the Market Works

Interest Rates

Stock Prices **decrease** with rising
Interest Rates.

How the Market Works

Stock Prices Goes Up When:

Earnings go up,
Inflation goes down and
Interest rates go down.

How the Market Works

What Causes
Bull & Bear Markets?

How the Market Works

What We Know

Earnings, Inflation and Interest Rates
Rise in a Strengthening Economy and
Fall in a Weakening Economy.

How the Market Works

What We Know

The Federal Reserve Bank
is mandated with the task of maintaining
Monetary Stability and Full Employment.

How the Market Works

What We Know

The Federal Reserve Bank
Seeks to maintain Monetary Stability
by raising interest rates to cool the economy.

How the Market Works

What We Know

The Federal Reserve Bank
Seeks to maintain Full Employment
by lowering interest rates to stimulate a
weak economy.

How the Market Works

The Virtuous/Vicious Cycle

- Inflation dictates the Fed's Interest Rate Policy.
- Interest Rates dictate the Strength of the Economy.
- The Economy dictates Earnings Growth.
- Earnings Growth dictates Stock Price Performance.
- The Fed's Policy dictates Bull & Bear Markets.

How the Market Works

The Investment Climate

VectorVest Monitors the Level and Trends
of
Earnings, Inflation and Interest Rates.

The Truth Chart

	<u>E</u>	<u>F</u>	<u>I</u>	<u>P</u>	
1.	U	U	D	U	Bull Market Begins
2.	U	D	D	U	Bull Market Thrives
3.	U	D	U	U	Rarely Happens
4.	U	U	U	U	Bull Market Ends
5.	D	U	U	D	Bear Market Begins
6.	D	D	U	D	Rarely Happens
7.	D	D	D	D	Bear Market Matures
8.	D	U	D	D	Bear Market Ends

How the Market Works

Bear Markets Begin

when the economy is strong, inflation and interest rates are high, and earnings are expected to fall.

Beginning of a Bear Market

On Friday, November 2, 2007

I wrote an essay about buying Contra ETFs and warned readers that yesterday's C/Dn signal "Could be the entrée to a long Bear market..."

How the Market Works



How the Market Works

Bull Markets are Born

when the economy is weak, inflation and interest rates are low, and earnings are expected to rise.

Birth of a Bull Market

On Friday, March 6, 2009

The world was gripped in a financial crisis of monumental proportions.

- The SPX was down 57% from its all-time high on 1,265.
- Investors were looking for any hint of good news.
- 651,000 non-farm jobs were lost in February and the unemployment rate hit 8.1%.

Birth of a Bull Market

On Friday, March 6, 2009

We wrote an essay called, "Itching to Rally" and said we would go long with one of the following strategies if an explosive rally Occurs.

Blyar's Bottom Feeders/BMB.
Bottom's Up.
Jail Break - No Contra ETFs.
Pirates Long.
Silber's Singles/BMB.

Birth of a Bull Market

On Friday, March 9, 2009

VectorVest advised Aggressive Investors to be alert to an explosive rally.

Dr. DiLiddo wrote, "For those of you who are "Riding the Wave", we are playing the downside of the market. We will exit these positions and go long with one of the following strategies if an explosive rally occurs."

Blyar's Bottom Feeders/BMB.
Bottom's Up.
Jail Break - No Contra ETFs.
Pirates Long.
Silber's Singles/BMB.

Birth of a Bull Market

On Tuesday, March 10, 2009

News came out, premarket, that CitiBank made money in the first quarter and THE MARKET EXPLODED.

We went long with Jail Break – No Contra ETFs at 10:00am.

The top 10 stocks were up:

*31.92% in just 3 days.
117.59% in a month,
660.73% in a year, and
1,483.89% to 12/13/18.*

It was the buying opportunity of a lifetime!

How the Market Works



How the Market Works

The Current Situation:*

The U.S. Market is in a
Case 1 Bull Market Scenario.
Earnings and Inflation are Rising,
while interest rates are falling

*12/06/2019

How the Market Works

The Outlook:

The Bull Market will continue as long
as it is perceived
that earnings are Rising.

Opening General Sessions

Break

10:15 AM – 10:30 AM

Opening General Sessions

The VectorVest System of Analyzing & Ranking Stocks

10:30 AM – 11:15 AM

The VectorVest System of Analyzing and Ranking Stocks

Every Investor should know:

1. What their stocks are really worth,
2. How safe they are and
3. When to Buy, Sell or Hold

This is information you won't get anywhere else!

The VectorVest System of Analyzing and Ranking Stocks

Stock Value

Value, as computed by VectorVest, tells you what a stock is currently worth based upon its earnings, earnings growth rate, profitability, inflation and interest rates.

The VectorVest System of Analyzing and Ranking Stocks

$$V = 100 \times \frac{E}{(IY + YP)} \times \text{Sqr} \left[\frac{(R + G)/2}{(IY + YP) + F} \right]$$

where

- E = Earnings in \$ / share
- IY = Interest Rate in %
- YP = Yield Premium
- R = % Return on Total Capital
- G = Earnings Growth in % / yr.
- F = Inflation Rate in % / yr.

VectorVest Stock Analysis – 12/06/19

Company	Symbol	Exch	Price	Value
Visa Inc	V	xN	182.17	155.43
Ross Stores	ROST	xO	113.91	123.81
Comcast A	CMCSA	xO	44.24	62.94
Benefit Focus	BNFT	xO	21.32	2.05

The VectorVest System of Analyzing and Ranking Stocks

Stock Value

- If price is less than Value, a stock is undervalued.
- When price is more than Value, you're paying a premium.

The VectorVest System of Analyzing and Ranking Stocks

Relative Value

Relative Value (RV), looks at the future. It compares Price and Value, takes a stock's risk and earnings growth into account, and indicates the investment potential of a stock compared to a similar investment in AAA bonds.

Favor buying stocks whose RV is more than 1.00

VectorVest Stock Analysis – 12/06/19

Company	Symbol	Exch	Price	Value	RV
Comcast A	CMCSA	xO	44.24	62.94	1.45
Ross Stores	ROST	xO	113.91	123.81	1.33
Visa Inc	V	xN	182.17	155.43	1.32
Benefit Focus	BNFT	xO	21.32	2.05	0.11

The VectorVest System of Analyzing and Ranking Stocks

Relative Safety

Relative Safety (RS), is an indicator of risk. It is computed from an analysis of the consistency and predictability of a company's financial performance, debt to equity ratio, sales volume, business longevity, price volatility and other factors.

Favor buying stocks whose RS is more than 1.00

VectorVest Stock Analysis – 12/06/19

Company	Symbol	Exch	Price	Value	RV	RS
Ross Stores	ROST	xO	113.91	123.81	1.33	1.54
Visa Inc	V	xN	182.17	155.43	1.32	1.48
Comcast A	CMCSA	xO	44.24	62.94	1.45	1.41
Benefit Focus	BNFT	xO	21.32	2.05	0.11	0.64

The VectorVest System of Analyzing and Ranking Stocks

Relative Timing

Relative Timing (RT), is computed from an analysis of the direction, magnitude, and dynamics of a stock's price movements day-over-day, week-over-week, quarter over quarter and year-over-year. If a trend dissipates, RT will gravitate toward 1.00.

Favor buying stocks whose RT is more than 1.00 and rising

VectorVest Stock Analysis – 12/06/19

Company	Symbol	Exch	Price	Value	RV	RS	RT
Ross Stores	ROST	xO	113.91	123.81	1.33	1.54	1.09
Visa Inc	V	xN	182.17	155.43	1.32	1.48	1.01
Comcast A	CMCSA	xO	44.24	62.94	1.45	1.41	0.96
Benefit Focus	BNFT	xO	21.32	2.05	0.11	0.64	0.66

The VectorVest System of Analyzing and Ranking Stocks

VST Vector

Value, Safety & Timing (VST), is computed from the square root of the weighted sum of the squares of RV, RS, and RT. Stocks with the highest VST ratings have the best combinations of Value, Safety and Timing.

Favor buying stocks whose VST is more than 1.00

VectorVest Stock Analysis – 12/06/19

Company	Symbol	Exch	Price	Value	RV	RS	RT	VST
Ross Stores	ROST	xO	113.91	123.81	1.33	1.54	1.09	1.32
Comcast A	CMCSA	xO	44.24	62.94	1.45	1.41	0.96	1.27
Visa Inc	V	xN	182.17	155.43	1.32	1.48	1.01	1.27
Benefit Focus	BNFT	xO	21.32	2.05	0.11	0.64	0.66	0.56

The VectorVest System of Analyzing and Ranking Stocks

VectorVest Stop-Price

Stop-Price (Stop), is computed from a 13 week moving average of closing prices, and is fine-tuned according to the stock's fundamentals.

Our Stop-Price can be treated as Gospel or a Guide.

VectorVest Stock Analysis – 12/06/19

Company	Symbol	Exch	Price	Value	RV	RS	RT	VST	Stop
Visa Inc	V	xN	182.17	155.43	1.32	1.48	1.01	1.27	166.86
Ross Stores	ROST	xO	113.91	123.81	1.33	1.54	1.09	1.32	104.77
Comcast A	CMCSA	xO	44.24	62.94	1.45	1.41	0.96	1.27	41.89
Benefit Focus	BNFT	xO	21.32	2.05	0.11	0.64	0.66	0.56	21.45

Buy, Sell or Hold Criteria

Buy (1) Price > Stop Price, (2) VST > 1, (3) RT > 1 and (4) Price must be diverging away from Stop Price

Sell Price < Stop Price

Hold Price > Stop, but any of the other three factors needed to receive a Buy are not met.

VectorVest Stock Analysis – 12/06/19

Company	Symbol	Exch	Price	Value	RV	RS	RT	VST	Stop	Rec
Ross Stores	ROST	xO	113.91	123.81	1.33	1.54	1.09	1.32	104.77	B
Comcast A	CMCSA	xO	44.24	62.94	1.45	1.41	0.96	1.27	41.89	H
Visa Inc	V	xN	182.17	155.43	1.32	1.48	1.01	1.27	166.86	B
Benefit Focus	BNFT	xO	21.32	2.05	0.11	0.64	0.66	0.56	21.45	S

Opening General Sessions

**Market Direction is Your Key
to Achieving Consistent
Performance**

11:15 AM – 12:00 PM

Market Direction is Your Key to Achieving Consistent Performance

“The single most important thing to know is
whether the market is going up or down.
Everything follows from that.”*

** Dr. Bart A. DiLiddo*

Market Direction is Your Key to Achieving Consistent Performance

Heed the Color Guard

The Daily Color Guard is a
Precise System of Timing the Market.

It is so Important,
it's Located at the Top of the Home Page.

**Market Direction is Your Key to
Achieving Consistent Performance**

Functions Like a Traffic Light

Green is Bullish, it's OK to Buy,
Yellow is Neutral, Caution is Advised,
Red is Bearish, do not Buy any Stocks.

THE COLOR GUARD DOES NOT TELL YOU
WHEN TO SELL.

**Market Direction is Your Key to
Achieving Consistent Performance**

**The VectorVest
Market Timing Graph**

Clearly shows when the market is rising, falling
or transitioning, and gives explicit market timing
signals.

**Market Direction is Your Key to
Achieving Consistent Performance**

**Confirmed Down (C/Dn) signals sound a
general alarm for protecting profits and
using your stops.**

VectorVest

SERVED LUNCH

12:00 PM – 1:00 PM

Day One

Afternoon Session

Breakout Sessions

Retirement Track

VectorVest - Retirement Track

How to Make Money with VectorVest

1:00 PM – 1:45 PM

How to Make Money with VectorVest

Keep things simple and focus on these 3 key elements:

1. Build A WatchList
2. Read the Graphs
3. Heed the Color Guard

How to Make Money with VectorVest

VectorVest WatchLists

Instantaneously gives you the answers to making better investment decisions.

How to Make Money with VectorVest

VectorVest WatchLists

Create a WatchList of stocks you already own so you can start separating winners from losers.

How to Make Money with VectorVest

Use Rank Analysis

- All WatchLists are ranked by VST-Vector.
 - The best stocks are at the top of the list.
 - The worst stocks are at the bottom of the list.
- Favor buying stocks from the top of each list.

How to Make Money with VectorVest

WatchList Favorites

- Midas Touch
- W-O-W WatchList
- Monthly Dividend Payers

How to Make Money with VectorVest

Read the Graphs

Favor smooth, steady rising price and smooth steady rising earnings.

How to Make Money with VectorVest

Heed the Color Guard

The Daily Color Guard is a
Precise System of Timing the Market.

It is so Important,
it's Located at the Top of the Home Page.

How to Make Money with VectorVest

Functions Like a Traffic Light

Green is Bullish, it's OK to Buy,
Yellow is Neutral, Caution is Advised,
Red is Bearish, do not Buy any Stocks.

THE COLOR GUARD DOES NOT TELL YOU
WHEN TO SELL.

How to Make Money with VectorVest

Three Yellow lights in the Color Guard:

1. Buy with Caution
2. Do not Buy at this Time

The Primary Wave dictates the action!

How to Make Money with VectorVest

Become A Green Light Buyer

“Even so, green lights should not be used with impunity...all green lights are not alike. Green lights which appear when prices are low offer better opportunities to make money than those that appear when prices are high”.

-Dr. Bart A. DiLiddo

(VV Views U.S. – 03/23/12)

How to Make Money with VectorVest

Watch the Daily Color Guard Reports
for expert daily guidance.

VectorVest - Retirement Track

When to Buy

1:45 PM – 2:30 PM

When to Buy

The Key to making money in any market is the fine art of buying low, selling high.

When to Buy

How does one know when a stock's price is low?

When to Buy

By Definition: A price is low when it is more likely to go up than it is to go down.

When to Buy

So how does one know when a price is more likely to go up than it is to go down?

When to Buy

Here's the Secret

Market Direction is the single most important factor in assessing a stock's likely price direction.

When to Buy

Let the Trend be Your Friend

Buy rising stocks in rising markets,
Protect Profits in falling markets.

When to Buy

The VectorVest Market Timing Graph

Clearly shows when the market is rising, falling or transitioning, and gives explicit market timing signals.

When to Buy

The VectorVest Market Timing Graph

Provides a variety of signals and Indicators to identify tops and bottoms.

When to Buy

VectorVest has nailed every top and every bottom for the last 29 years!

VectorVest - Retirement Track

Break

2:30 PM – 2:45 PM

VectorVest - Retirement Track

What to Buy

2:45 PM – 3:30 PM

What to Buy

VectorVest advocates buying safe, undervalued stocks, rising in price.

What to Buy

Stock Viewer is the place to start looking for stocks to buy.

What to Buy

How I use Stock Viewer

“Stock Viewer is a gold mine. Our job is to find the gold contained therein and extract it.”*

*VV Views – 11/10/2006

What to Buy

UniSearch quickly and easily finds stocks that are right for you!

What to Buy

VectorVest Simple

Favor smooth, steady rising price and smooth,
steady rising earnings.

VectorVest - Retirement Track

When to Sell

3:30 PM – 4:00 PM

When to Sell

The toughest part of making money in stocks lies in knowing when to sell.

When to Sell

VectorVest advocates selling risky, overvalued stocks, falling in price.

When to Sell

- Always set a Stop-Price before buying any stock.
- Stop-Prices should be set to limit the loss in any position to no more than 1% of your portfolio value.

When to Sell

VectorVest calculates a Stop-Price for every stock, every day, based upon a 13-week moving average of closing prices, adjusted for fundamentals.

When to Sell

Price falling below the 40 Day MA or RT crossing below one provide an early warning that a Sell recommendation is typically right around the corner.

When to Sell

Profit Locker Pro

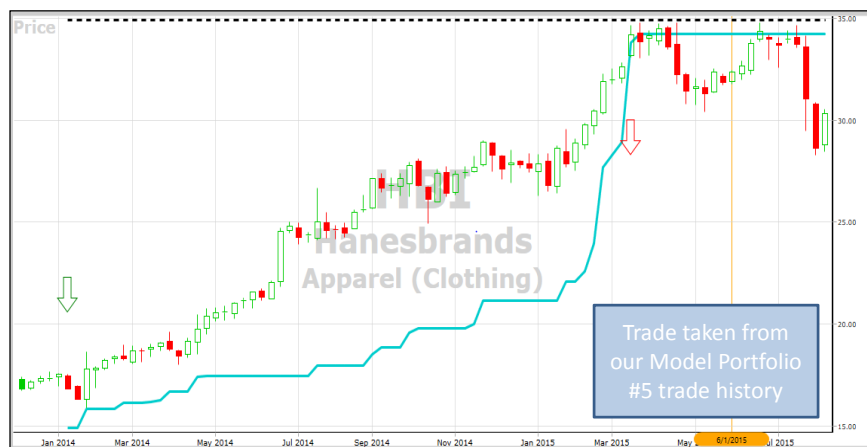
A dynamic system of setting trade stops

When to Sell

Profit Locker Pro

Creates unique ratcheting stop that adjusts in real time according to your profit and loss specifications.

When to Sell



When to Sell

Confirmed Down (C/Dn) signals sound a general alarm for protecting profits and using your stops.

Breakout Sessions

Trader Track

VectorVest - Trader Track

The Anatomy of a Swing Trade

1:00 PM – 1:45 PM

The Anatomy of a Swing Trade

What I Do:

1. Intraday trading of mostly the Dow Jones index (PM UK time)
2. Swing trades lasting 3-21 days in UK and USA stocks. This is today's subject.
3. Core trades in Stocks lasting 2-6 months
4. A pension stock portfolio focusing on yield

The Anatomy of a Swing Trade

What is Needed to Win?

To make cash in any timeframe we need three things

1. A Method...
2. Manage our Money
3. Manage ourselves

The Anatomy of a Swing Trade

1. The overall market is on your side. You've determined that the market is trending in the same direction you want to swing trade.

VectorVest has totally objective market timing models

The Anatomy of a Swing Trade



The Anatomy of a Swing Trade

2. The industry group is on your side. Stocks tend to follow their industry groups up or down. If the security's industry group is trending strongly in the same direction you want to swing trade the probabilities of success increase.
3. Trade in the very best shares. Shares that have excellent growth characteristics with fair safety of earnings. How to find the best stocks was discussed earlier today.

The Anatomy of a Swing Trade



“Good portfolio management starts with buying the right stocks.” –Dr. Bart DiLiddo

The Anatomy of a Swing Trade

4. The candidate stock should be in an existing uptrend that has pulled back in the short term.

The Comfort Index (CI) finds shares that are trending easily and quickly. Alternatively a moving average cross system (50 and 150) finds trending stocks.

The Anatomy of a Swing Trade

Comfort index looks at:

1. The trend of the share over the last 3 years
2. The volatility of the share price chart
3. The fundamentals

If the share is trending with little volatility and the fundamentals are improving, then that should offer us comfort.

The Anatomy of a Swing Trade

Top RS and CI Stocks

RS * CI DESC, Symbol ASC Top 100 Return: Stocks QuickTest Top: 10 Graph All QuickFolio Selected

Run Search 12/2/2019 3:59 PM Stream TRADENOW OptionsPro

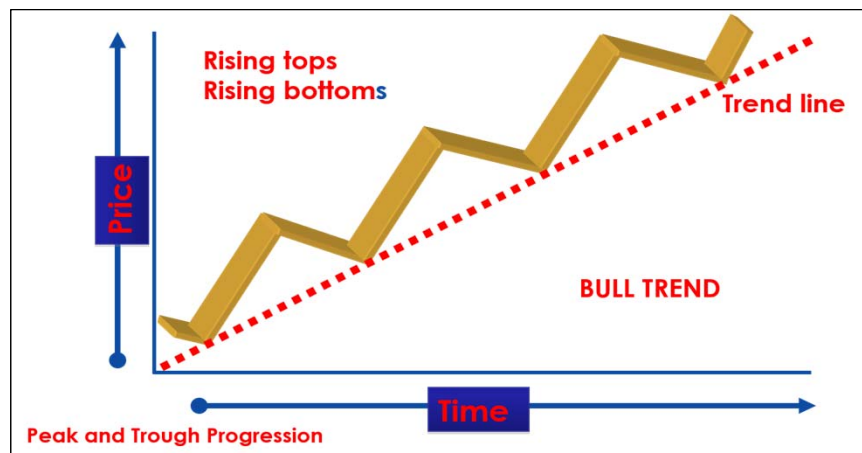
Parameters

Date/Time	Parameter	Operator	Value
Time of Search	Stock GRT - (Growth Rate)	>	52 weeks ago Stock GRT
Time of Search	Stock Price - (Actual)	>	1
Time of Search	Stock AvgVol - (50 day moving A...	>	100000
Time of Search	Stock EPS - (Earnings Per Share)	>	0
Time of Search	Stock CI - (Comfort Index)	>	1
4 weeks ago	Stock CI - (Comfort Index)	<	1
*			

The Anatomy of a Swing Trade

5. The share should pullback to the last old high most of the time. This pullback should occur on falling volume.

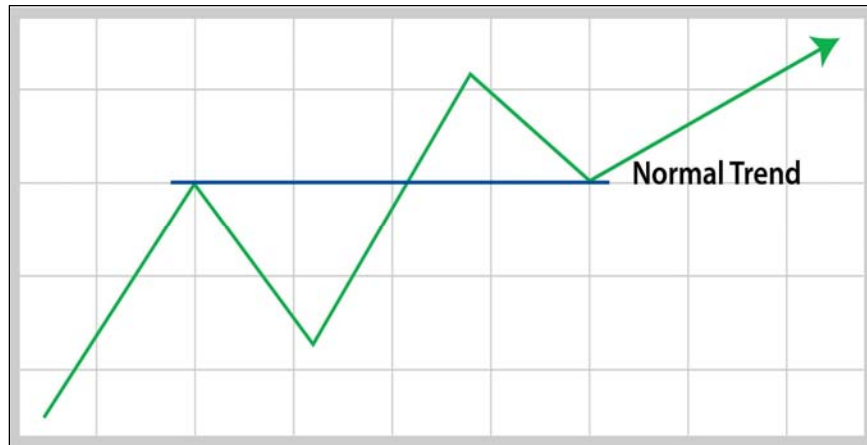
The Anatomy of a Swing Trade



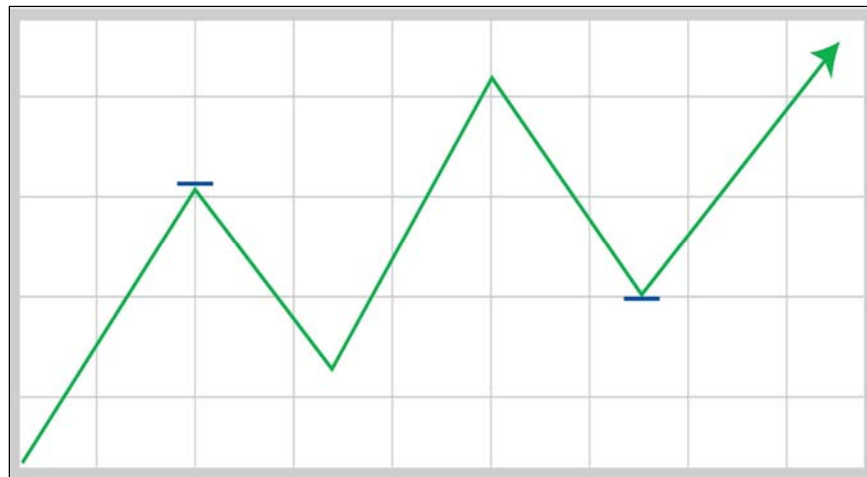
The Anatomy of a Swing Trade



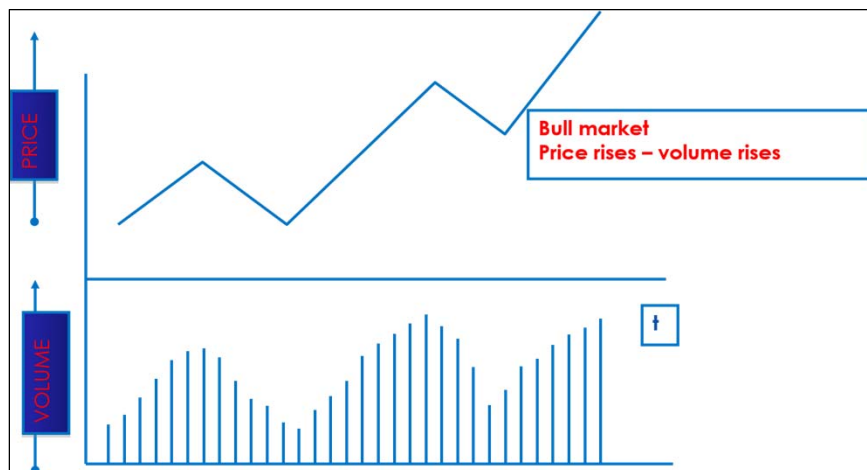
The Anatomy of a Swing Trade



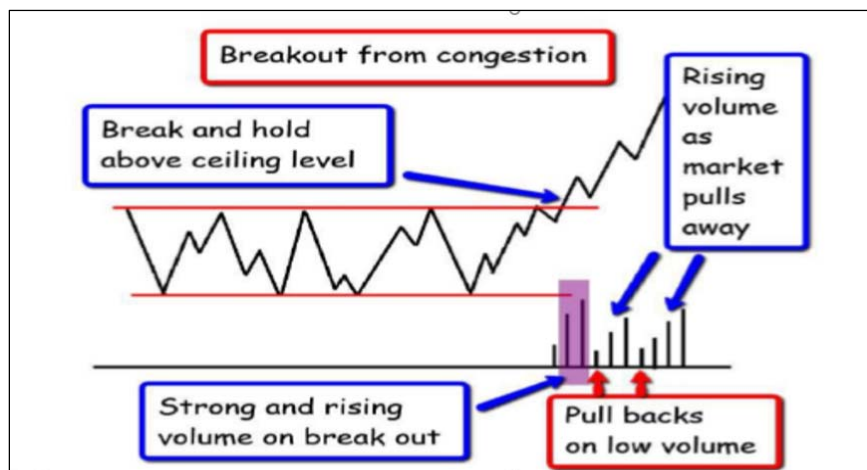
The Anatomy of a Swing Trade



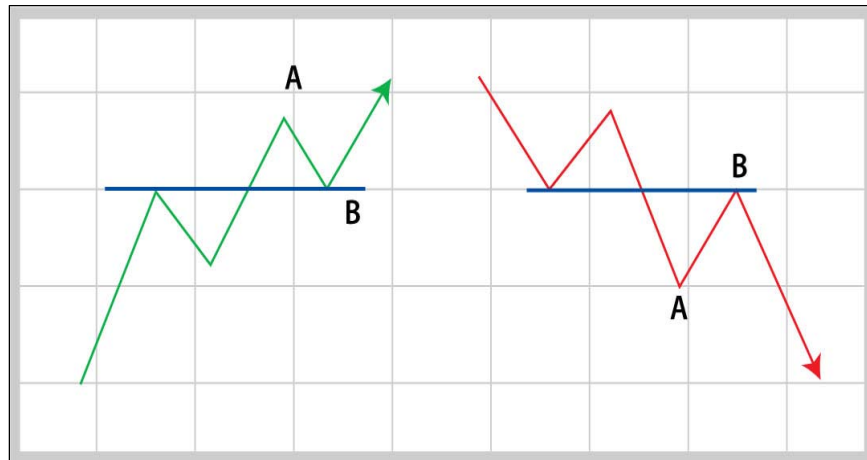
The Anatomy of a Swing Trade



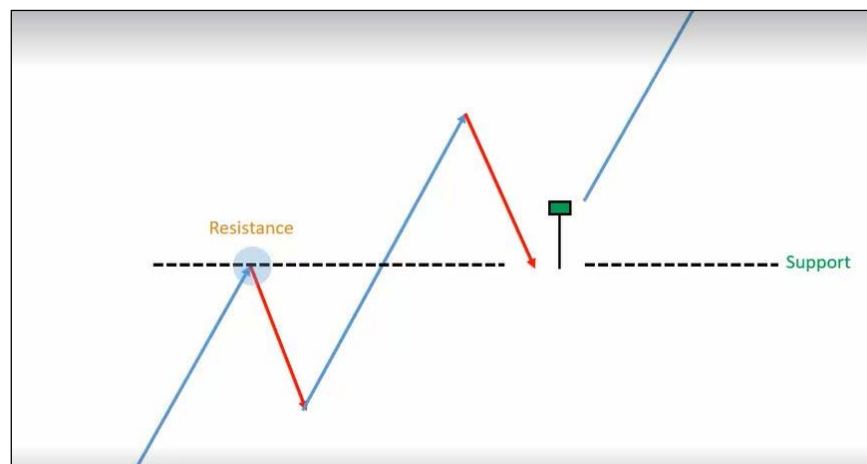
The Anatomy of a Swing Trade



The Anatomy of a Swing Trade



The Anatomy of a Swing Trade



The Anatomy of a Swing Trade



The Anatomy of a Swing Trade



The Anatomy of a Swing Trade



The Anatomy of a Swing Trade



The Anatomy of a Swing Trade



The Anatomy of a Swing Trade

6. Use a technical indicator (an oscillator...14 day Stochastic is good) to generate and confirm buy signal. Divergences between your oscillator and the price action signal higher-confidence trades.

The Anatomy of a Swing Trade



The Anatomy of a Swing Trade

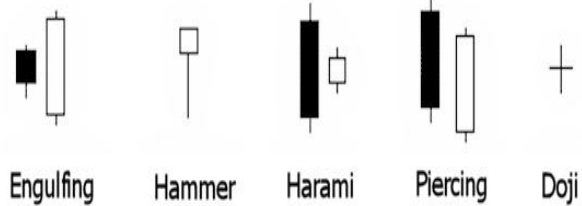


The Anatomy of a Swing Trade

7. Candlestick patterns make excellent entry points. Many traders use a candlestick pattern plus a close above an 8 ema to confirm a reversal.

The Anatomy of a Swing Trade

Bullish candlestick patterns



The Anatomy of a Swing Trade

8. How much money is in your account. If you don't know how much is in your account, you can't size your positions correctly you are GAMBLING and not trading.

Vow never to lose any more than 1% of your account in any single trade.

The Anatomy of a Swing Trade

9. Size your positions correctly. Use the VectorVest stop loss and calculate the risk/share bought.

$\text{Risk/share} = \text{Purchase Price} - \text{Stop Price}$

Let N = Number of shares bought

$N * \text{Risk/share} = 1\% \text{ Account Size.}$

The Anatomy of a Swing Trade

10. Managing the trade.

To start split your position into two parts.

Sell half for a profit when you have made as much as you have risked.

Get the stop loss to entry. You now can make money at no risk.

The Anatomy of a Swing Trade

Let's say the entry is \$10 and the stop loss is \$8.50. The Risk/share is 1.50.

When the position has increased to 11.50 in value exit $\frac{1}{2}$ of the shares and bring the stop up from 8.50 to entry at 10.

Let the remaining half run using the VV stop as a trailing stop loss.

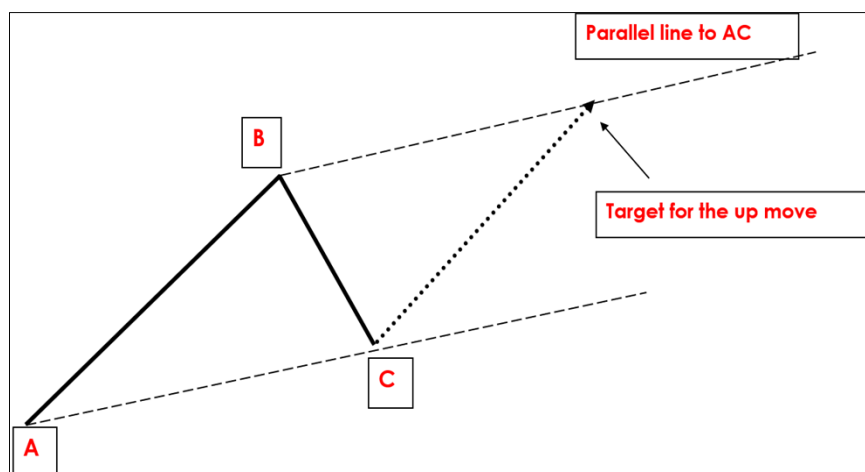
The Anatomy of a Swing Trade

This method is emotionally easiest to trade but it is only profitable if you keep your hands off the remaining half.

Around 30% will turn into runners. No targets are used. Exits by a close below the VV stop.

Advantage...emotionally easy... quick gratification.

The Anatomy of a Swing Trade



The Anatomy of a Swing Trade

The BIG SECRET...Much to secret to put into PowerPoint. I will talk you through it.

The Anatomy of a Swing Trade

“Everyone's got a plan until they get a punch in the mouth”.

- Mike Tyson

The Anatomy of a Swing Trade

“Are you working the bag or is the bag working you?”

- Clint Eastwood to Hilary Swank in the film
“Millionaire Dollar Baby”.

VectorVest - Trader Track

How to Use Top Technical Indicators

1:45 PM – 2:30 PM

Technical vs. Fundamental Analysis

- Technicians study the price / volume behavior of a company's stock and relate them to the future price behavior of the stock.
- Fundamentalists study a company's business and financial performance, assess the value for the stock and assume that the stock's price will eventually reflect its value.

Top Technical Indicators

- MACD
- Support & Resistance
- Stochastics

Different Types of Markets

Trending

Trading

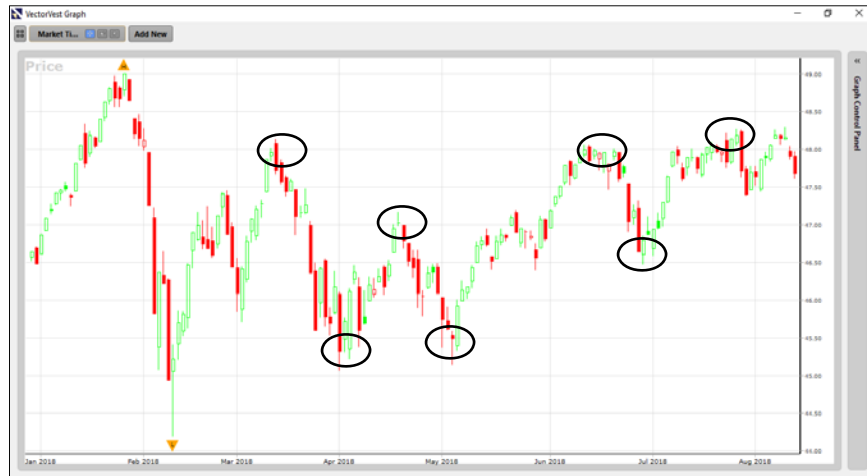
WHEN

Extremes

Trending Market



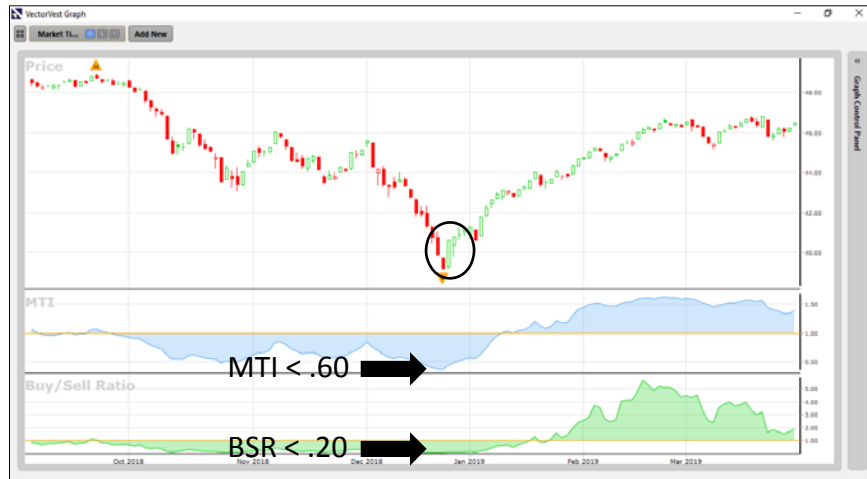
Traders Market



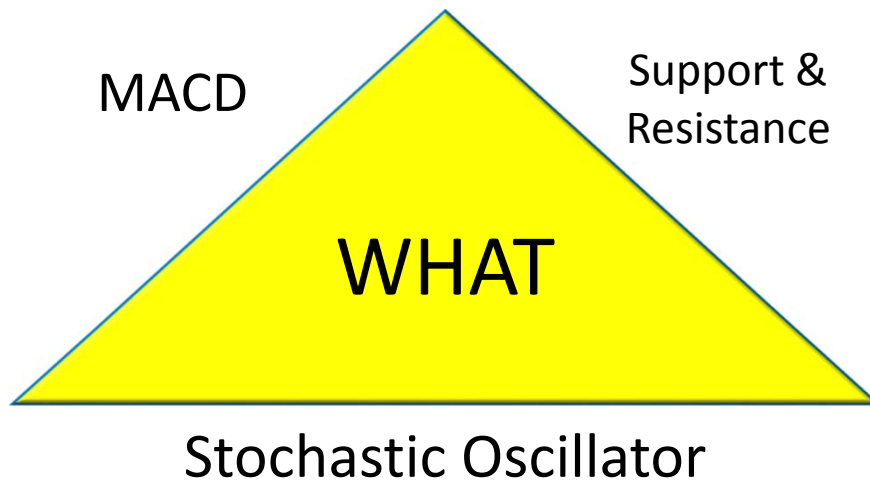
Traders Market



Extremes



Top Indicators by Situation



MACD

Description:

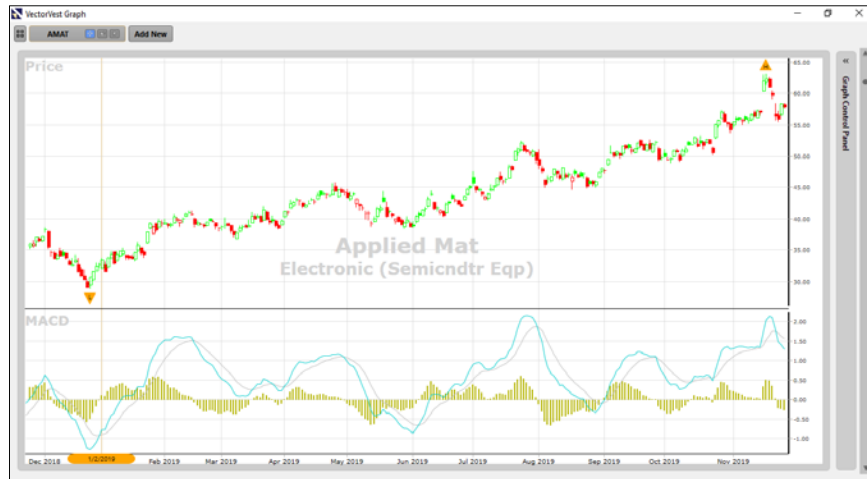
- MACD indicator consists of two lines derived from three EMAs
 - MACD line – difference between a fast EMA (e.g., 12-day) and a slow EMA (e.g., 26-day)
 - Signal line – an EMA (e.g., 9-day) of the MACD line
- Histogram – MACD line minus the signal line

MACD

Interpretation:

- Crossover:
 - Buy signal – when MACD rises above its signal line
 - Sell signal – when MACD falls below its signal line
- Divergence:
 - When the price diverges from the MACD, it signals an end of the current trend.
- Dramatic Rise:
 - When the shorter moving average moves away from the longer moving average it indicates an overbought or oversold condition and the price will return to normal levels soon.

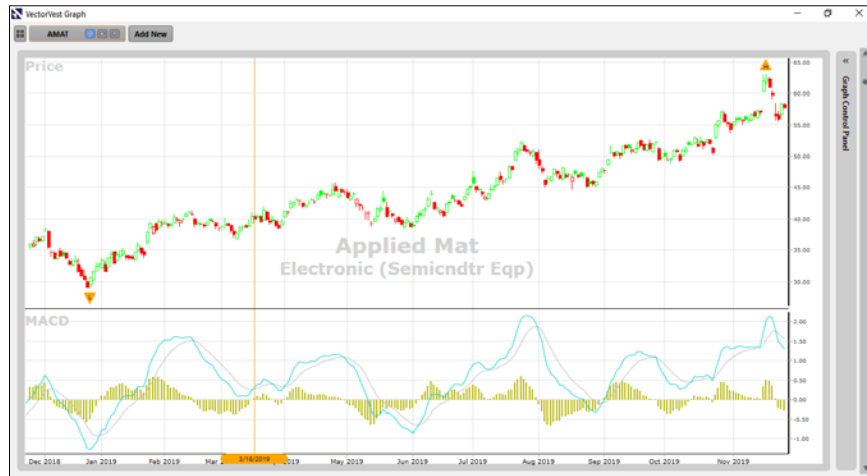
MACD Chart



MACD Chart



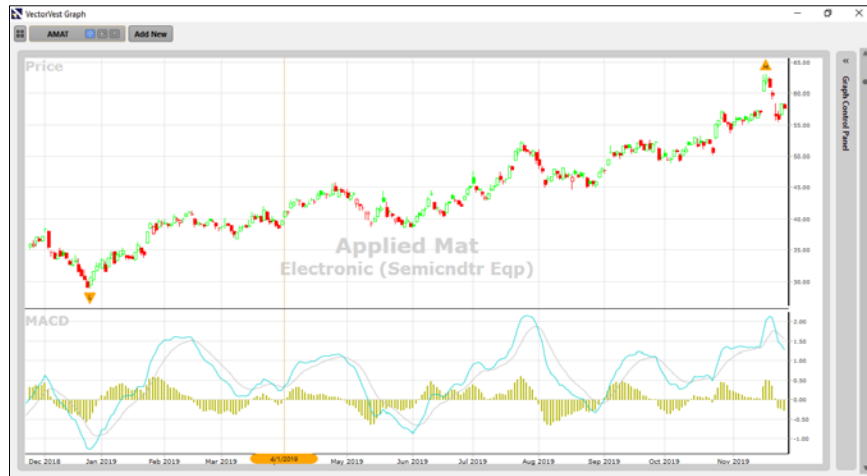
MACD Chart



MACD Chart



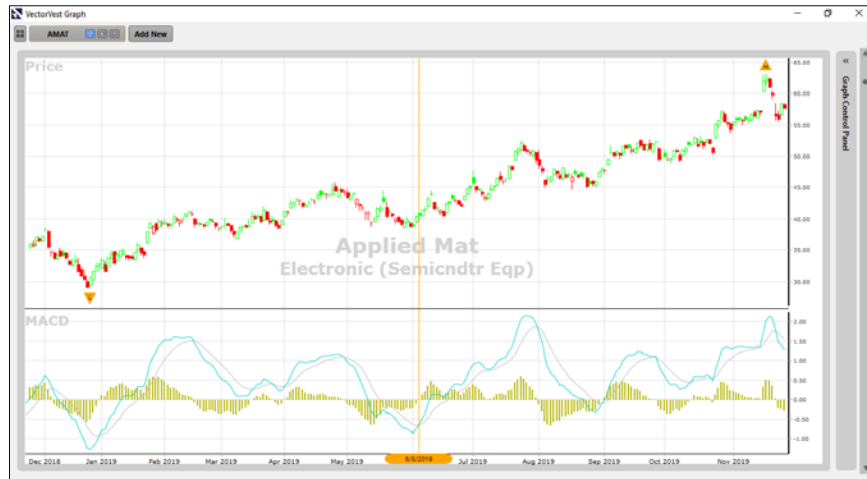
MACD Chart



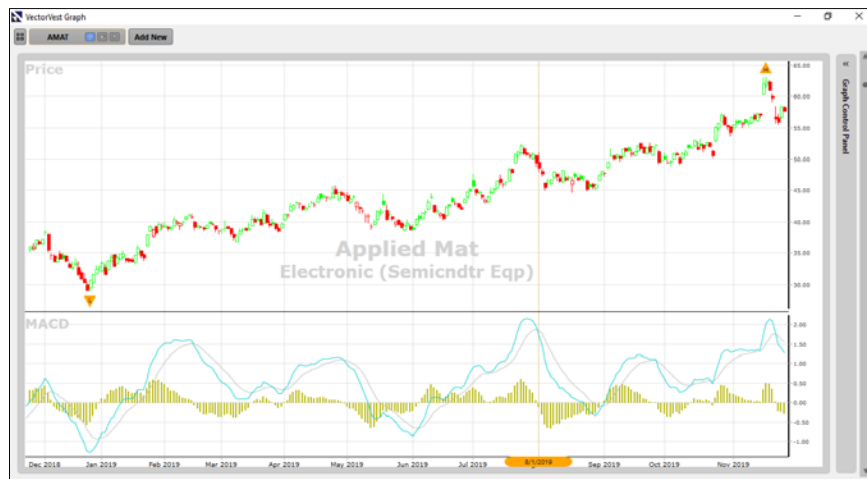
MACD Chart



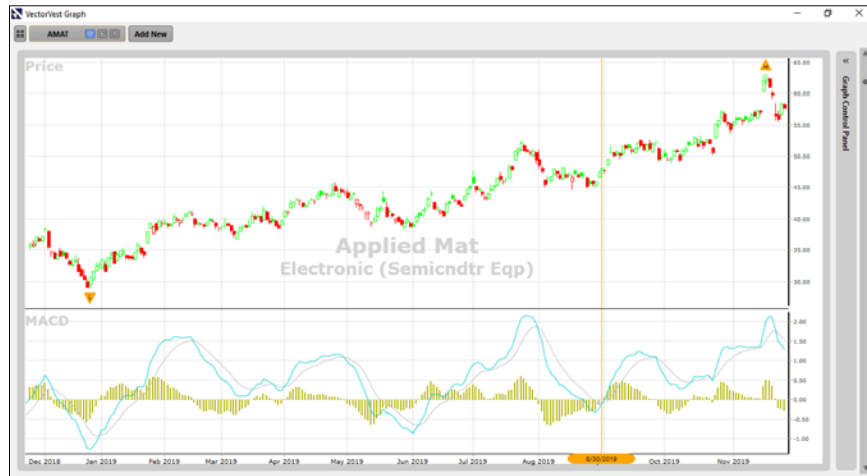
MACD Chart



MACD Chart



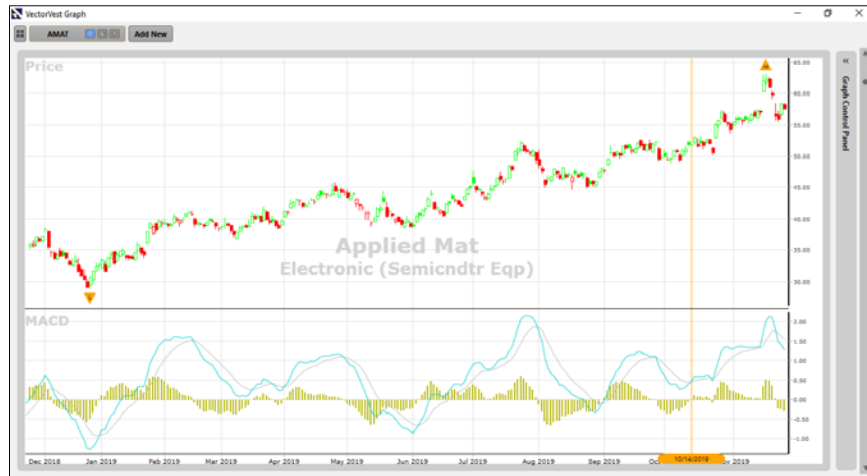
MACD Chart



MACD Chart



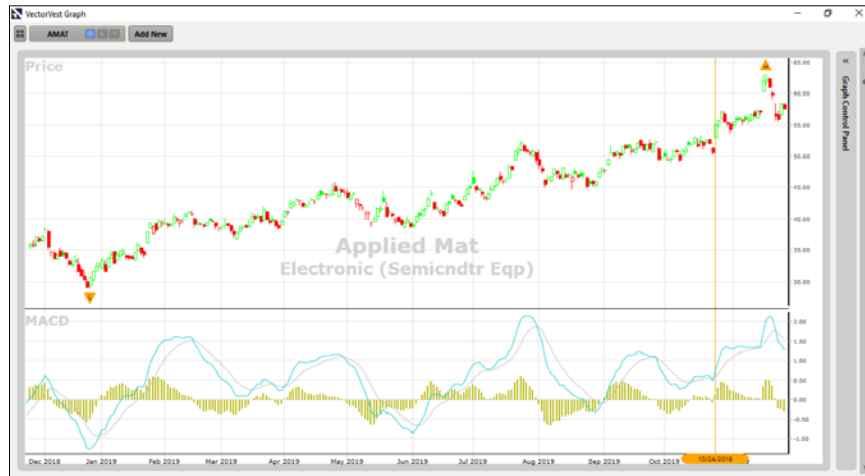
MACD Chart



MACD Chart



MACD Chart



MACD Case Study

Date: 03/29/2019

Situation: Primary Wave Up Signal

Search: MACD Crossover - Long

1. Click on the UniSearch tab.
2. Click on the ProTrader Folder, then click on MACD Crossover - Long.
3. Run Search on 03/29/19.
4. Graph & QuickTest the top 10.

Quick Test Results

QuickTest - MACD Crossover - Long				
3/29/2019 - 4/12/2019 Run Test Reset Sort				
Record Count - 10 (10 Winners, 0 Losers, 0 Even)				
Symbol	Begin Price	End Price	% Price Cha	Total ARR
UNP	167.20	169.50	1.38%	35.89%
MRCY	64.08	66.13	3.20%	83.46%
ADBE	266.49	271.86	2.02%	52.57%
ATHM	105.12	107.54	2.30%	60.06%
AOS	53.32	55.51	4.11%	107.16%
OILU	26.97	32.34	19.91%	519.46%
AON	170.70	176.12	3.18%	82.84%
USOU	32.958	39.36	19.42%	506.78%
UWT	18.08	21.58	19.36%	505.05%
FAST	32.155	34.855	8.40%	219.07%
Average:	\$93.7073	\$97.4795	8.33%	217.23%
Compare To: VVC				
Symbol	Begin Price	End Price	% Price Cha	Total ARR
VVC	46.48	47.593	2.39%	62.47%

Support & Resistance

- **Support** – the price area under the market where buying pressure overcomes or equals selling pressure
 - Price decline is stopped (Floor)
 - Prices begin to rise or move sideways
- **Resistance** – the price area over the market where selling pressure overcomes or equals buying pressure
 - Price advance is stopped (Ceiling)
 - Prices begin to fall or move sideways

S/R Trading Zones

- Identify price zones rather than specific price levels
- Successful retests indicate the strength of the support-resistance zones

Support & Resistance



Support/Resistance Case Study

Date: 11/01/2019

Situation: VVC Breaking Resistance

Search: Breaking Resistance - 2%.

1. Click on the UniSearch tab.
2. Click on ProTrader folder, then Breaking Resistance - 2%
3. Filter by S&P500 Watchlist.
4. Run Search on 11/01/19.
5. Graph & QuickTest the top stocks.

Quick Test Results

QuickTest - Breaking Resistance - 2%				
11/1/2019 - 11/26/2019 3:59 PM Run Test Reset Sort				
Record Count - 6 (5 Winners, 1 Losers, 0 Even)				
Symbol	Begin Price	End Price	% Price Cha	Total ARR
BWA	43.65	42.84	-1.86%	-27.11%
URI	141.86	156.29	10.17%	148.61%
LYB	93.60	93.66	0.06%	0.94%
SWKS	98.30	99.12	0.83%	12.19%
RF	16.55	16.59	0.24%	3.53%
FTNT	90.13	104.37	15.80%	230.83%
Average:				
	\$80.6817	\$85.4783	4.21%	61.50%
Compare To: VVC				
Symbol	Begin Price	End Price	% Price Cha	Total ARR
VVC	48.55	49.3453	1.64%	23.93%

Stochastics Oscillator

Description:

- Developed by George Lane
- Compares the closing price to the range (high – low) over a specified look back period
 - Close near high = strength
 - Close near low = weakness
- Combines two elements: Moving averages and relative strength
- Calculations – very tedious

Stochastics Oscillator

Interpretation:

- A Stochastic level above 80 usually indicates an overbought level.
- A Stochastic level below 20 usually indicates an oversold level.
- Watch for bullish or bearish divergences to identify trend changes when the indicator is at an overbought or oversold level
- Works best in a neutral (non-trending) market

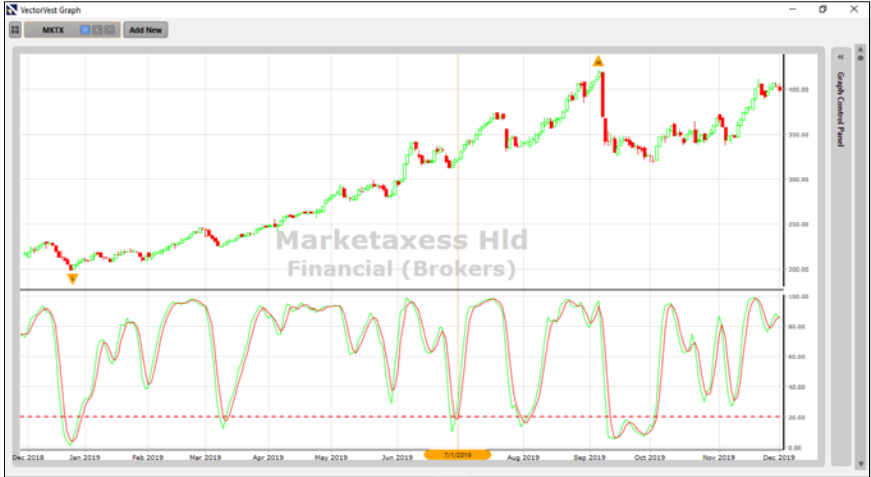
Stochastics Chart



Stochastics Chart



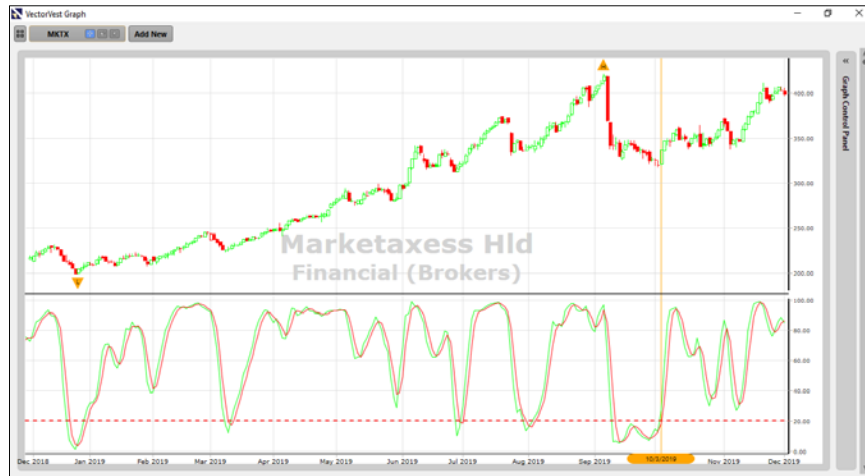
Stochastics Chart



Stochastics Chart



Stochastics Chart



Stochastics Case Study

Date: 10/10/2019

Situation: VVC retraced from Support, Primary Wave UP, Bullish Harami Confirmed.

Search: Stochastics - Crossing Above 20

1. Click on the UniSearch tab.
2. Click on the ProTrader Folder, then click on Stochastics – Crossing Above 20.
3. Filter by S&P500 Watchlist.
4. Run Search on 10/10/19.
5. Graph & QuickTest the top 10.

Quick Test Results

QuickTest - Stochastics - Crossing Above 20 SP500

10/10/2019 - 11/29/2019 CLOSE Stream Run Test Reset Sort

Record Count - 10 (8 Winners, 2 Losers, 0 Even)

Symbol	Begin Price	End Price	% Price Cha	Total ARR
TSN	82.13	89.89	9.45%	69.02%
BKNG	1962.91	1904.03	-3.00%	-21.91%
UHS	145.83	139.49	-4.35%	-31.76%
FAST	31.02	35.52	14.51%	105.97%
CVS	62.14	75.27	21.13%	154.35%
HUM	261.15	341.23	30.66%	224.00%
CAT	122.69	144.73	17.96%	131.23%
PVH	83.80	96.96	15.70%	114.72%
CERN	66.84	71.59	7.11%	51.91%
BK	43.50	48.97	12.57%	91.86%
Average:	\$286.201	\$294.768	12.18%	88.94%
Compare To: VVC				
Symbol	Begin Price	End Price	% Price Cha	Total ARR
VVC	46.763	49.4215	5.69%	41.53%

VectorVest - Trader Track

Break

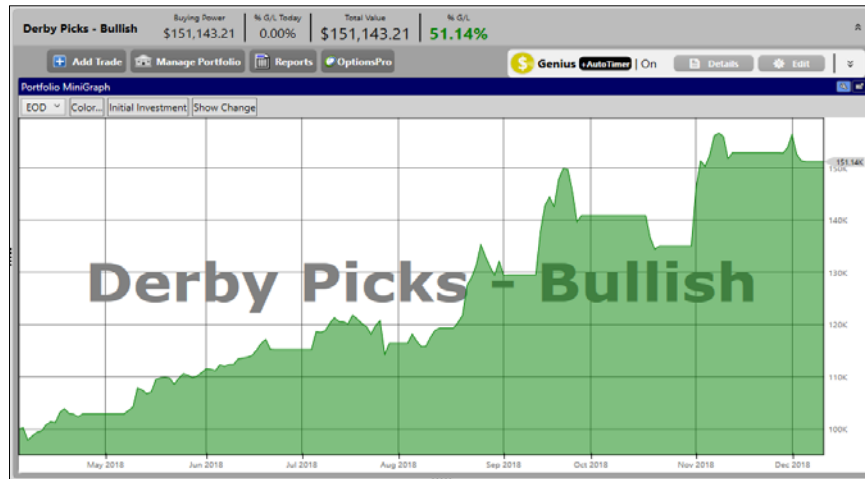
2:30 PM – 2:45 PM

VectorVest - Trader Track

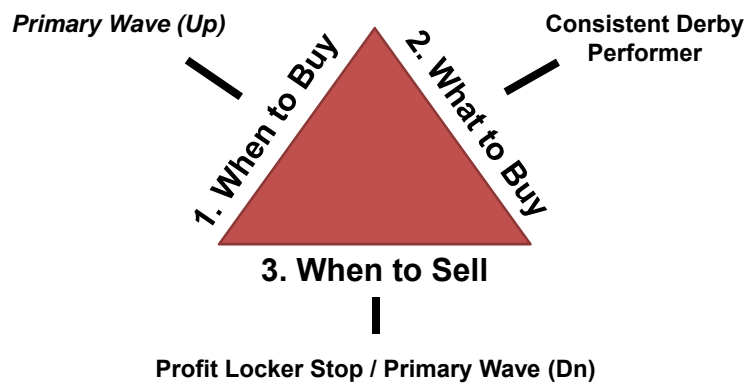
Swing Trading the VectorVest Derby

2:45 PM – 3:30 PM

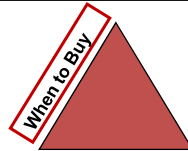
Swing Trading the VectorVest Derby



Your System Determines Your Success



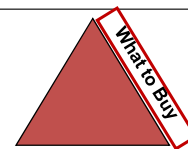
Your System Determines Your Success



1. When to Buy (Market Timing System):

We will use the Primary Wave Up signal as our timing signal to buy stocks.

Your System Determines Your Success



2. What to Buy

(Consistent Derby Performer):

We will use both the 'Vary the Start Date' and 'Sliding Window' modes in the Derby to test the entire 3 months of rolling historical data available in the Derby calendar.

*Print out both lists of results from the Derby 'Spreadsheet View' and isolate the bullish search that finishes closest to the top of both lists.**

**This is the same procedure used to determine what search is the best for each future campaign as well.*

Your System Determines Your Success

3. When to Sell

(Cut Losers Quickly and Let Winners Run):



We will use Profit Locker to manage our trades.

- ✓ *Target % = 28*
- ✓ *Stop % = 7*

Your System Determines Your Success

*You're on your way to becoming a
swing trading wizard!*

VectorVest - Trader Track

Trading System Automation

3:30 PM – 4:00 PM

Automated Trading

Automated trading has gained considerable popularity in the investing community.

Automated Trading

Automated Trading

1. Free up time
2. Reduces Stress and Emotion
3. Produces better results

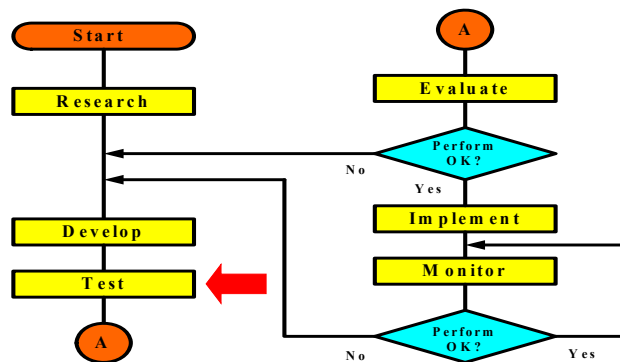
Automated Trading

A fully developed trading system includes a complete set of rules for selecting, entering, exiting a position along with money management and asset redeployment specifications.

Automated Trading

Harness the power and convenience of VectorVest's tools and trading systems.

Trading System Flowchart



Automated Trading

Favor Smooth, Steadily Rising Equity Curves

- Examine the Trade History.
 - Is the system making money year over year?
 - What's the Annualized Rate of Return?
 - Maximum Drawdown?

Automated Trading

RoboTrader is there to execute your plan exactly the way you planned it.

Automated Trading

OK, so how do I get started?

Establish a trading account with one of our Broker Partners and link your account to VectorVest.

Link Your Brokerage Account

Brokerage Signup

Link to Brokerage

Now you can trade directly through the VectorVest platform

ally INVEST.

Already a Ally client?
Click below to connect to your existing Ally account.

»LINK TO MY ACCOUNT

Not a Ally client?
Click below for a special offer to open a new Ally account today.

»OPEN A NEW ACCOUNT

[LEARN MORE](#) | [SEE IT IN ACTION](#)

Interactive Brokers

Already a Interactive Brokers client?
Click below to connect to your existing Interactive Brokers account.

»LINK TO MY ACCOUNT

»LINK TO MY PAPER ACCOUNT

[SEE IT IN ACTION](#)

TradeStation

Already a TradeStation client?
Click below to connect to your existing TradeStation account.

»LINK TO MY ACCOUNT

»LINK TO MY SIMULATED ACCOUNT

Not a TradeStation client?
Click below for a special offer to open a new TradeStation account today.

»OPEN A NEW ACCOUNT

[LEARN MORE](#) | [SEE IT IN ACTION](#)

Automated Trading

Next, subscribe to RoboTrader and select your trading system.

Automated Trading

BUT, why limit yourself to one?

Diversify your investments by choosing multiple trading plans.

Automated Trading

RoboTrader will trade up to 5 plans simultaneously!

VectorVest

CockTail Reception

4:15 PM – 5:00 PM

VectorVest

Special Presentation

5:00 PM

VectorVest

**VectorVest Two-Day
Investment Seminar**

End of Day One

VectorVest

**VectorVest Two-Day
Investment Seminar**

Start of Day 2

Day Two

Morning Session

Breakout Sessions

Retirement Track

VectorVest - Retirement Track

Understanding the Importance of Industry & Sector Rotation

9:00 AM – 9:45 AM

Business Sectors & Industry Groups

Birds of a Feather Flock Together

VectorVest analyzes Industry Groups and Business Sectors in the same way it would analyze an individual stock.

Business Sectors & Industry Groups

Relative Timing

RT is the key indicator when analyzing Industry Groups, Business Sectors and ETF's.

Business Sectors & Industry Groups

A Picture is worth a Thousand Words!

Industry Group and Business Sector graphs provide the best indication of what has happened in the past, what is happening now and what is likely to happen in the future.

Business Sectors & Industry Groups

The Past is Prologue

1. Examine Long-Term Price Trends
2. Study the Relationship between Price, Stop, and Relative Timing
3. Examine 10 x 30 Week Moving Average Crossovers

Business Sectors & Industry Groups

RT Shows What's Hot and What's Not

1. Beware of Stocks in Groups Falling from Top 30 Ranked by RT.
2. Bottom-Fish for Stocks Rising from Bottom 20 Ranked by RT.
3. Is RT Rank Above or Below that of the VVC?

Business Sectors & Industry Groups

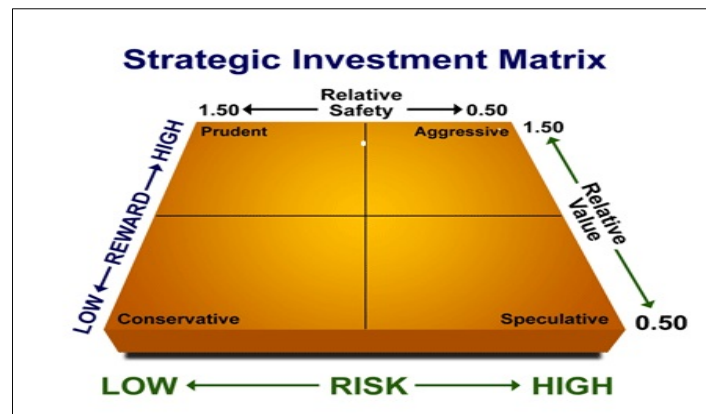
Ranking by Industries or Sectors by Comfort Index (CI) will put the best performing right at your fingertips.

VectorVest - Retirement Track

Using UniSearch to Enhance Performance

9:45 AM – 10:30 AM

Investment Styles & Strategies



Using UniSearch to Enhance Performance

UniSearch Tool is the most powerful search engine on the market today!

Using UniSearch to Enhance Performance

Stock Selection Searches

Searches look for stocks meeting a certain set of conditions at a fixed point in time.

- Searches can be performed on Stocks, WatchLists, Industries or Sectors.
- Searches are generally categorized as: Prudent, Conservative, Aggressive or Speculative.
- Searches can be sorted by Groups or Alphabetically.

Using UniSearch to Enhance Performance

Selecting Searches

- Select Search Group
- Select Search
- Run search
- Use QuickTest to Check Results

Using UniSearch to Enhance Performance

Performance QuickTest

Use Quick Test to Count Winners & Losers
and measure raw performance.

Conservative – Case Study

Date: 01/18/19

Situation: Confirmed Up Signal

Search: Conservative Stocks

1. Click on the UniSearch tab.
2. Click on Searches – Conservative folder, then Conservative Stocks.
3. Run Search on 01/18/19.
4. QuickTest to 05/08/19 - the first C/Dn.

QuickTest Results

QuickTest - Conservative Stocks				
1/18/2019 - 5/8/2019 Stream Run Test Reset Sort				
Record Count - 10 (7 Winners, 3 Losers, 0 Even)				
Symbol	Begin Price	End Price	% Price Cha	Total ARR
MKTX	219.18	280.82	28.12%	93.38%
WST	105.25	120.44	14.43%	47.92%
BRO	28.64	31.95	11.56%	38.38%
GL	81.98	86.87	5.96%	19.81%
MMS	69.40	72.35	4.25%	14.11%
NKE	80.45	82.77	2.88%	9.58%
JKHY	130.87	134.41	2.70%	8.98%
RGA	149.13	147.01	-1.42%	-4.72%
ROL	38.68	36.73	-5.04%	-16.74%
RMD	117.84	111.42	-5.45%	-18.09%
Average:	\$102.142	\$110.477	5.80%	19.26%
Compare To: VVC				
Symbol	Begin Price	End Price	% Price Chan	Total ARR
VVC	44.019	47.167	7.15%	23.75%

Prudent – Case Study

Date: 01/18/2019

Situation: Confirmed Up Call

Search: Best of the Biggies

1. Click on the UniSearch tab.
2. Click on Searches – Prudent folder, then Best of the Biggies
3. Run Search on 01/18/2019.
4. QuickTest to 05/08/19 - the first C/Dn.

QuickTest Results

QuickTest - Best of the Biggies

1/18/2019 - 5/8/2019 Stream Run Test Reset Sort

Record Count - 10 (9 Winners, 1 Losers, 0 Even)

Symbol	Begin Price	End Price	% Price Ch	Total ARR
AAPL	156.82	202.90	29.38%	97.57%
FB	150.04	189.54	26.33%	87.42%
MA	202.00	245.33	21.45%	71.23%
MSFT	107.71	125.51	16.53%	54.87%
V	138.50	160.76	16.07%	53.37%
AMZN	1696.20	1917.77	13.06%	43.37%
JPM	104.59	112.61	7.67%	25.46%
GOOGL	1107.30	1170.78	5.73%	19.04%
CRM	152.51	156.86	2.85%	9.47%
UNH	265.50	239.15	-9.92%	-32.95%
Average:	\$408.117	\$452.121	12.92%	42.88%
Compare To: VVC				
Symbol	Begin Price	End Price	% Price Chan	Total ARR
VVC	44.019	47.167	7.15%	23.75%

Aggressive – Case Study

Date: 12/28/18

Situation: First Primary Up Wave after a market low.

Search: Traders Alert

1. Click on the UniSearch tab.
2. Click on Searches – Aggressive folder, then Traders Alert.
3. Run Search on 12/28/18.
4. QuickTest to 01/28/19 – P/Dn.

QuickTest Results

QuickTest - Traders Alert				
12/28/2018 - 1/28/2019 Stream Run Test Reset Sort				
Record Count - 9 (6 Winners, 3 Losers, 0 Even)				
Symbol	Begin Price	End Price	% Price Ch	Total ARR
EBR	6.40	9.10	42.19%	497.06%
KL	25.25	30.23	19.72%	232.38%
CZZ	8.95	10.51	17.43%	205.37%
GLUU	7.97	9.23	15.81%	186.27%
ENIA	8.85	10.09	14.01%	165.08%
CROX	26.64	28.89	8.45%	99.51%
DECK	128.60	125.99	-2.03%	-23.91%
MLNX	91.90	82.74	-9.97%	-117.44%
SIGA	7.41	6.64	-10.39%	-122.43%
Average:	\$34.6633	\$34.8244	10.58%	124.65%
Compare To: VVC				
Symbol	Begin Price	End Price	% Price Chan	Total ARR
VVC	40.914	43.865	7.21%	84.98%

Speculative – Case Study

Date: 12/28/18

Situation: First Primary Up Wave after a market low.

Search: Garbage Time

1. Click on the UniSearch tab.
2. Click on Searches – Speculative folder, then Garbage Time.
3. Run Search on 12/28/18.
4. QuickTest to 01/28/19 – the next P/Dn.

QuickTest Results

QuickTest - Garbage Time

12/28/2018 - 1/28/2019 Stream Run Test Reset Sort

Record Count - 10 (8 Winners, 2 Losers, 0 Even)

Symbol	Begin Price	End Price	% Price Ch	Total ARR
PIR	6.202	18.142	192.52%	2,268.30%
NVFY	0.46	0.71	54.35%	640.34%
CATB	4.079	5.82	42.68%	502.89%
AMRH	4.315	5.63	30.48%	359.07%
ESTR	1.38	1.726	25.07%	295.41%
CIFS	0.83	1.00	20.48%	241.32%
MLNT	4.085	4.516	10.55%	124.31%
RSLSD	31.164	33.00	5.89%	69.41%
SEII	0.339	0.30	-11.50%	-135.55%
FTNW	2.32	1.897	-18.23%	-214.82%
Average:	\$5.5174	\$7.2741	35.23%	415.07%
Compare To: VVC				
Symbol	Begin Price	End Price	% Price Chan	Total ARR
VVC	40.914	43.865	7.21%	84.98%

Trade Now

*Did you know you can trade right
from VV7?*

Trade Now

Select any stock(s) and use the *Trade Now* feature to execute trades immediately.

Trade Now

The *Trade Now* button links to your trading account and allows you to Buy, Sell or Short any stock directly through VectorVest.

Trade Now Window

Orders Status: All Orders

Symbol	Action	Type	Qty	Status	Bid	Ask	Last	Fill Price	Duration	Transaction Time	Order ID

Order Ticket Preferences ...

Symbol	Company	Action	Bid	Ask	Last	Qty	Order Type	Limit	Duration	
HP	Helmrch&Payne	Buy	61.40	61.46	61.43	0	Market	61.43	Day	X
NUS	Nu Skin EntprA	Buy	38.87	38.93	38.93	0	Market	38.9	Day	X
ATVI	Activision	Buy	19.91	19.92	19.912	0	Market	19.92	Day	X
LECO	Lincoln Elec	Buy	66.75	66.81	66.82	0	Market	66.78	Day	X
NKE	Nike Inc. B	Buy	95.26	95.28	95.28	0	Market	95.27	Day	X

VectorVest - Retirement Track

Break

10:30 AM – 10:45 AM

VectorVest - Retirement Track

Automating Your Portfolio

10:45 AM – 11:30 AM

Automating Your Portfolio

Build a Portfolio of your Stocks

The best way to manage your stocks and keep track of investment performance is in Portfolio Manager.

Automating Your Portfolio

Let the Portfolio Genius Alert You to:

- Closing positions when they have met your stop price
- Opening new positions from the search of your choice
- Change campaigns based on VectorVest's market timing signals
- It's a wonderful way to test your ideas!

Automating Your Portfolio

Model Portfolios

When in doubt, Follow the model Portfolios. It's an easy way get started on the right track.

Automating Your Portfolio

Various Reports

Transaction Log
Summary Report
Diversification Graph
Trade History

VectorVest - Retirement Track

Situational Investing

11:30 AM – 12:15 PM

Situational Investing

Recognizing what the market is doing and implementing strategies that are consistent with that behavior.

Situational Investing

Common Strategies

1. Buy and Hold Stocks in All Markets.
2. Sell Weak Stocks in Bear Markets.
3. Combine 1 and 2. "Riding the Wave."
4. Go Bottom-Fishing for Big Profits.

Situational Investing

Buy and Hold Stocks in All Markets

Buy 20 'Long-term Winners – RS Desc.' on 05/14/96,
Hold to 12/06/19.
587.25% Total Gain,
Over 24% ARR

Long-Term Winners – RS Desc.



Situational Investing

Sell Weak Stocks in Bear Markets

Sell 10 'Worst Stocks Above \$20.00' Short on C/Dn's from
11/01/07 to 3/10/09.

Cover All on C/Up's.

Total Gain = 125.16%

Annualized RR = 92.35%

Not Recommended in Bull Markets Unless Hedging.

Worst Stocks Over \$20.00



Situational Investing

Riding-the-Wave

Buy Stocks Long on Up Waves.
Sell Stocks Short on Down Waves.

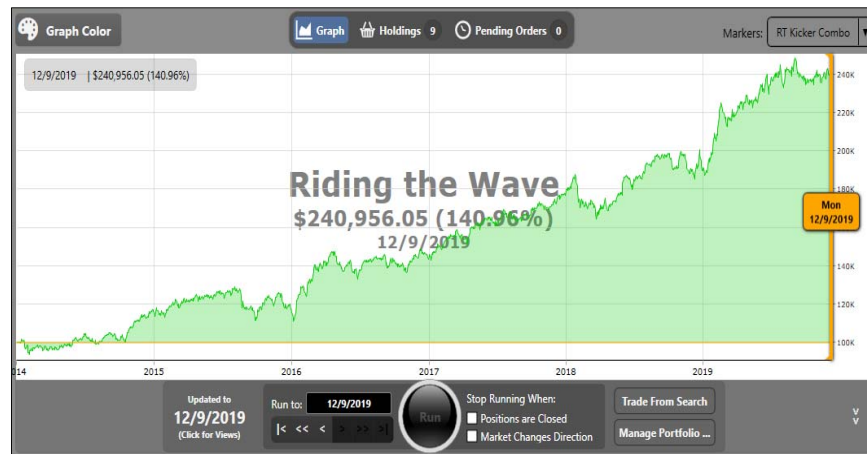
Situational Investing

Riding The Wave

Model Portfolio #5
Trading Template from 01/02/14 to 12/06/19.

Total Gain = 140.96%
Annualized RR = 23.76%
Max Drawdown = 13.58%

Model Portfolio #5



Situational Investing

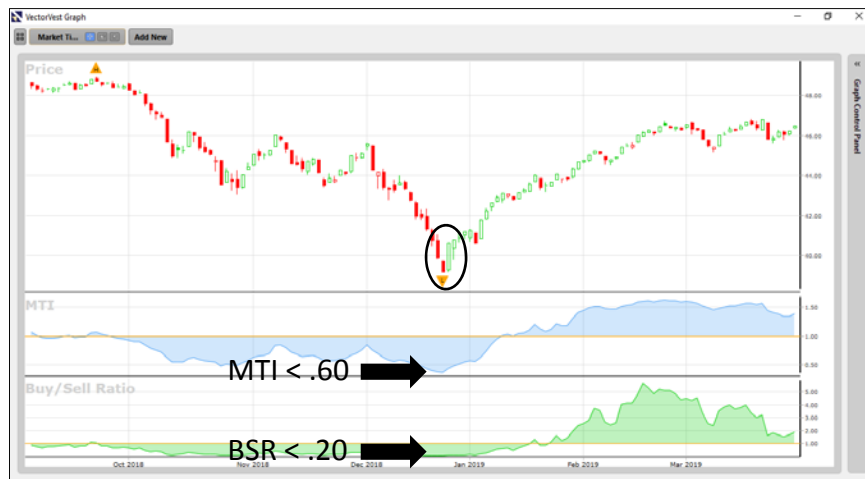
The Art of Bottom Fishing

- It requires a different way of thinking
- You want to identify stocks that are hitting bottom when the market has bottomed
- The stocks will often carry 'Sell' recommendations

Situational Investing

Effective Bottom-Fishing requires precise timing!

Extremes



Bottom Fishing – Case Study

Date: 12/26/2019

Situation: Confirmed Up Call

Search: Jailbreak – No Contra ETFs

1. Click on the UniSearch tab.
2. Click on Searches – Bottom Fishing, then Jailbreak – No Contra ETF's
3. Run Search on 12/26/2018.
4. QuickTest to 1/28/19 - the first P/Dn.

Bottom Fishing – Case Study

QuickTest - Jail Break - No Contra ETFs				
12/26/2018 - 1/28/2019 Stream Run Test Reset Sort				
Record Count - 10 (10 Winners, 0 Losers, 0 Even)				
Symbol	Begin Price	End Price	% Price Chan	Total ARR
YRCW	2.66	5.82	118.80%	1,314.87%
ALT	1.90	3.20	68.42%	757.30%
GUSH	79.10	109.50	38.43%	425.38%
GSM	1.64	2.27	38.41%	425.18%
OILU	14.52	18.92	30.30%	335.40%
HCR	3.49	4.39	25.79%	285.43%
HZN	1.39	1.70	22.30%	246.84%
HOS	1.08	1.30	20.37%	225.46%
CLSD	1.05	1.12	6.67%	73.79%
NK	1.03	1.09	5.83%	64.47%
Average:	\$10.786	\$14.931	37.53%	415.41%
Compare To: VVC				
Symbol	Begin Price	End Price	% Price Change	Total ARR
VVC	40.627	43.865	7.97%	88.21%

Situational Investing

Recognizing what the market is doing and implementing strategies that are consistent with that behavior is easy if you have VectorVest.

Breakout Sessions

Trader Track

VectorVest - Trader Track

How to Find Hot Stocks

9:00 AM – 9:45 AM

Hot Stocks

'Hot Stocks' were initiated during the Daily Color Guard Report and provide investors and traders with high momentum equities and ETF's, no matter the direction of the market.

Hot Stocks

The 'Hot Stocks' search finds high flying; smooth sailing Buy rated stocks hitting a new 5-week high.

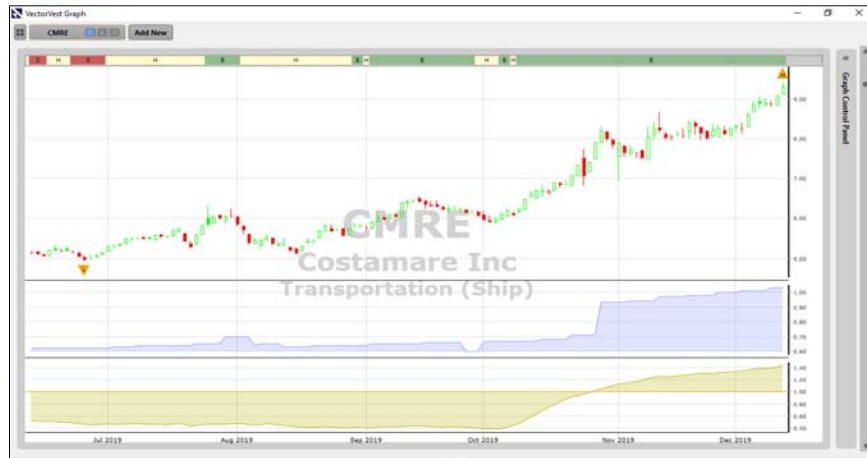
Hot Stocks

The stocks have moved higher over the past 2 days, have gone up more than 1% for the day and whose CI (Comfort Index) has increased over the past 4 weeks.

Hot Stock Example



Hot Stock Example



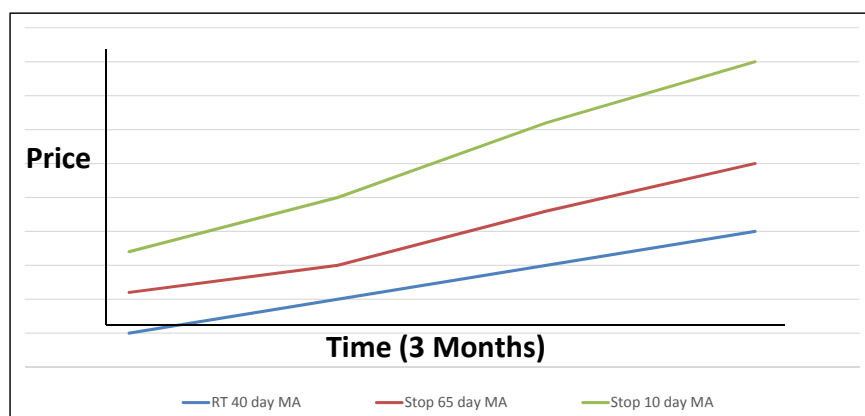
Hot Stock Example



The Midas Touch

The Midas Touch Technique was originally developed to time the gold market. We found it worked so well for the gold market we began to apply the technique to individual stocks.

The Midas Touch



Midas Touch

4 Graph Analysis Rules

1. The 10-day Stop Price MA must be above the 65-day Stop Price MA.
2. The Stop Price MA's must be hitting new 3-month highs.
3. The 40-day RT MA must be above 1.
4. The 40-day RT MA must be hitting a new 3 month high.

The Amazing Midas Touch

The best defense is good offense...Trade in the very best shares. Those shares with the best combination of Value, Earnings growth and Earnings Safety that are rising in price.

Midas Touch



Midas Touch



Midas Touch



VectorVest - Trader Track

Asset Allocation & Risk Management

9:45 AM – 10:30 AM

Asset Allocation & Risk Management

“Everyone got a plan until they get a punch in the mouth”.

- Mike Tyson

Asset Allocation & Risk management

“Are you working the bag or is the bag working you?”

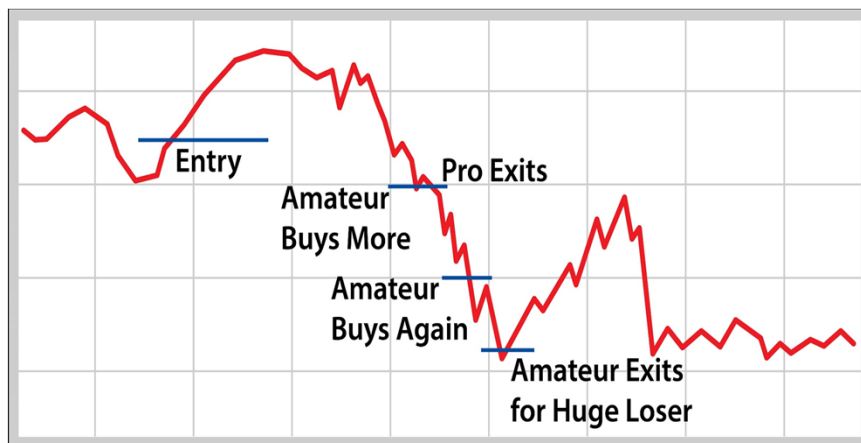
- Clint Eastwood to Hilary Swank in the film “Millionaire Dollar Baby”.

Asset Allocation & Risk Management

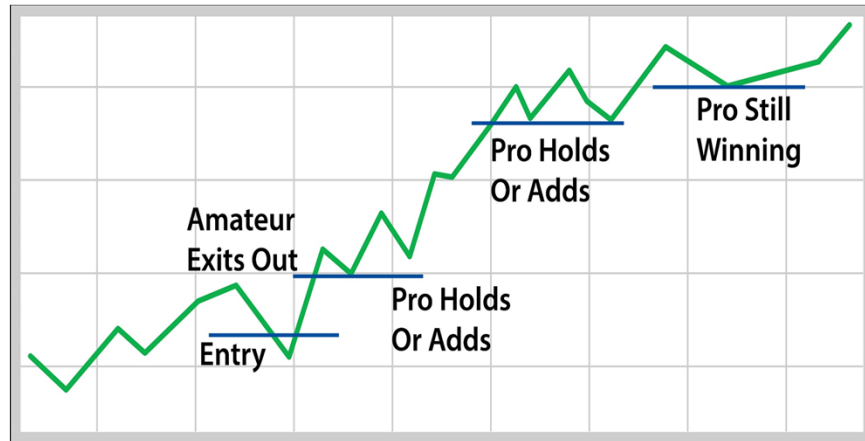
WHAT I DO

1. Intraday trading of mostly the Dow Jones index (PM UK time)
2. Swing trades lasting 3-21 days in UK and USA stocks
3. Core trades in Stocks lasting 2-6 months
4. A pension stock portfolio focusing on yield

Losing Traders



Winning Traders



Risk Management

What's the difference between investing and trading?
Frequency comes to mind. Trading being frenetic activity while investing is pursued on a much longer time frame.

Investing is for DY and trading is to make cash?

My own definition is stated next. I have never seen it written anywhere else like this, but it should stimulate thought.

Risk Management

I believe that the major difference between traders and investors is how each manages the risk involved.

1. Investors manage risk largely via diversification . Ten well chosen shares can be managed with less risk than one share. This is the basic tenet of modern portfolio management.
2. Traders manage risk via a stop loss order. There is somewhere on the chart where we are just simply wrong.

Risk Management

To make cash in any timeframe we need three things

1. A Method...covered over the two days in detail
2. Manage our Money
3. Manage ourselves.

Risk Management

Is the Apple chart going up or down
tomorrow?

What do you think?

Risk Management

The old wisdom is that the market may go up or down
but not necessarily in that order.

In my pocket I have the perfect system the pound coin.

Heads APPL is going up, tails its going down.

Would you trade like that?

Risk Management

Have you chosen yet?

Why are you frowning?

Would you consider trading like this?

After asking this question to roomfuls of traders over the years the answer is that most certainly would not.

Risk Management

OK I would not like to trade with the coin as well.

LET'S CONSIDER A SPECIAL GAME

IF YOU CAN PREDICT THE OUTCOME OF TOSSING A COIN, I WILL
PAY OUT TWICE AS MUCH AS YOU ARE PREPARED TO BET.

IF you bet \$1, I will pay you out \$2 if your prediction is
successful.

Clearly if you are incorrect in your prediction, I will take
the \$1.

Risk Management

Would you play that game?

Risk Management

IT'S A GREAT GAME TO PLAY.

IN 10 tosses of the coin the pay out is as follows:

- $(5 \cdot 2)$ when you are right minus $(5 \cdot 1)$ when you are wrong assuming a \$1 bet size.
- This means that you make 50 cents every time that you toss the coin.
- If you can get someone to underwrite this game, then you can write yourself a check forever.

Risk Management

In trading the number of times that you are right is known as the HIT RATE.

In trading the payoff is known as the risk to reward ratio.

THE MONEY THAT YOU MAKE IS A FUNCTION OF BOTH HIT RATE AND RISK TO REWARD.

Risk Management

MOST TRADERS ONLY THINK ABOUT HIT RATE.

THE INTERNET IS FULL OF HIGH HIT RATE SYSTEMS BECAUSE MOST TRADERS WILL ONLY PURCHASE SUCH A METHOD

MOST OF THESE SYSTEMS IN FACT LOSE MORE WHEN THEY ARE WRONG THAN THEY MAKE WHEN THEY ARE RIGHT.

Risk Management

WHATS THE EXPECTENCY OF THE FOLLOWING SYSTEM:

HIT RATE is 90% (wow...this will sell like cold beer at a football game)

Right makes 10 points

Wrong loses 90 points

Risk Management

The expectancy is the trading system is...

$$(9*10)-(1*90)=0$$

AFTER all that work the system breaks even.

The system vendors seminars are full because the high hit rate pulls them in

Risk Management

TO GET THE HIGH HIT RATE THE VENDOR HAS TO OPEN UP THE STOPS IN RELATION TO THE TARGET.

High hit rate systems are emotionally easy to trade but rarely make decent money.

Risk Management

System expectancy is a function of :

1. Hit rate
2. Risk to reward
3. Commissions and spreads

Risk Management

HAVE I CONVINCED YOU THAT IT'S A GOOD GAME TO PLAY?

BUY Apple at \$218 with a stop at \$201 and a target of \$252

Risk is \$17 the target is \$34

If you can get this correct 50% of the time you've got it made in trading. The only thing remaining is **learning how to play the game.**

That's what this day is all about.

Risk Management



Risk Management

LET'S IMAGINE THAT WE HAVE 100 EQUAL COINS IN A VESSEL. THIS IS YOUR TRADING KITTY.

Every trade has two decisions associated with it :

1. Long or short
2. How much do I bet.
What percentage of my kitty do I risk on any one trade?

Risk Management

THIS DECISION OF HOW MUCH IS THE MOST IMPORTANT QUESTION IN TRADING

THE BET SIZE IS THE DIFFERENCE IN \$ BETWEEN YOUR ENTRY POINT AND THE STOP LOSS WHICH IS APPROPRIATE

WE ARE PLAYING A 50/50 GAME WITH A 2:1 RISK TO REWARD RATIO GAME.

THE CONCEPT IS CALLED POSITION SIZING.

Risk Management

PROBABILITY OF A BAD CALL = $1/2$

Prob of a cluster of 2 in a row = $1/2 * 1/2 = 1/4$

Prob of a cluster of 3 in a row = $1/8$

THIS means that in a 50/100 system, if you bet one third of your coins on any one trade that you go broke every 8 trades.

Risk Management

Many small and large traders go broke with a great system because a run of bad luck (which is a mathematical certainty) that takes them out before the good streak starts.

Risk Management

FIRST DECISION OF THE DAY

HOW MUCH IS IN YOUR ACCOUNT?

Very few decide on this. They totally believe that the share is going up and they buy lots of it. It does not go up. Before they can trade again, they must top up their account.

Risk Management

The only thing that effects the risk of a trade is the account size and the position sizing model used. It has got nothing to do with Apple or any share.

Risk Management

If you don't know how much money in in your account, then you cannot size your position correctly.

If you do not size your position correctly then you are gambling and NOT trading.

Risk Management

You cannot control market direction, but you can decide upon your risk.

This will keep you alive in a normal losing streak without too much drawdown and ready to profit from a winning streak around the corner.

The most important thing in trading is to have enough money to trade tomorrow.

Risk Management

LET'S assume an account size of \$100,000
1% risk would equate to a risk on each trade of \$1,000.

If a sensible stop loss for your method is \$14 the you
could buy $1000/14=70$ shares in Apple from the
previous chart.

If the trade falls apart you will have lost \$1,000. NEXT.

Risk Management

$N * \text{Risk/share (dollars)} = 1\% \text{Account size}$
(I will do a calculation of this in the seminar)
Where N is the number of shares to be bought
Risk/share is the \$ amount by subtracting the entry
point from the stop loss level
Account Size is agreed upon at the outset of the trading
business

Risk Management

50/100	66/100	80/100
1/2	1/3	1/5
1/4	1/9	1/25
1/8	1/27	1/125
1/16	1/81	1/625

The table summarizes the relationship between hit rate and the probability of a streak of poor luck.

Risk Management

Two Objectives:

1. Survive the clusters arithmetically i.e. you don't go broke in them by risking too much in a single trade
2. Surviving the clusters emotionally. Executing with precision after a cluster of bad trades takes strength and presence of mind.

VectorVest - Trader Track

Break

10:30 AM – 10:45 AM

VectorVest - Trader Track

How to Reduce Risk and Increase Profits

10:45 AM – 11:30 AM

Options 101

Why Options?

Options provide the trader an inexpensive and limited risk way to take advantage of a stock, ETF, or market index move in either a bullish, bearish, or neutral move.

You'll also see they provide the best ROI in most cases.

Options Terminology

There are a few terms you'll need to know to start trading options:

Calls and Puts

Strike

Expiration

Premium

Delta

Moneyness

Options Terminology

There are two types of options:
Calls and Puts

Options Terminology

A Call gives the option buyer the right but not the obligation to purchase a stock at a specified price (strike) and by a certain date (expiration).

A purchase of a call is a proxy for being long a stock.

Options Terminology

A Put gives the option buyer the right but not the obligation to sell a stock at a specified price (strike) and by a certain date (expiration).

A purchase of a put is a proxy for being short a stock.

Options Terminology

The option chain typically gives you all the information you need.

The screenshot displays an options chain for IBM stock. At the top, it shows the stock price at 134.60 and various volatility measures. The main table is divided into 'Calls' and 'Puts' sections, with sub-sections for different expiration dates: Jan 17, 2020 (29 days till expiration) and Feb 21, 2020 (64 days till expiration). Each row in the table represents an option contract, with columns for Theta, Vega, Gamma, Delta, IV, Bid, Ask, Last, Strike, and other metrics. The table is color-coded to highlight different types of options, such as at-the-money (ATM) and out-of-the-money (OTM) contracts.

Calls														Puts													
Theta	Vega	Gamma	Delta	IV	QI	Vol	Net	Bid	Ask	Last	Strike	Last	Ask	Bid	Net	Vol	QI	IV	Delta	Gamma	Vega	Theta	ITM	Disc			
Jan 17, 2020 (29 days till expiration)																											
-0.016	0.040	0.017	0.566	17.16	615	73	0.68			3.93	135.00	0.26			-0.07	37	5844	19.52	-0.076	0.026	0.0541	-0.0183	7.9%	7.4%			
-0.0363	0.1060	0.0467	0.7947	16.36	1813	43	0.21			5.11	130.00	0.75			-0.08	76	8990	16.62	-0.2097	0.0467	0.1071	-0.0305	25.9%	22.4%			
-0.0421	0.1487	0.0734	0.4932	14.58	10124	688	0.06			2.07	135.00	2.35			-0.16	183	5796	15.01	-0.5102	0.0723	0.1487	-0.0307	53.5%	40.0%			
-0.0238	0.0925	0.0484	0.1647	13.75	13630	314	-0.01			0.44	140.00	5.75			-0.25	36	4665	14.41	-0.8358	0.0554	0.0966	-0.0198	78.6%	49.2%			
-0.0089	0.0325	0.0167	0.0406	14.93	9996	48	0.00			0.09	145.00	10.69			-0.16	4	1428	21.37	-0.8952	0.0253	0.0721	-0.0218	93.0%	49.5%			
Feb 21, 2020 (64 days till expiration)																											
-0.0269	0.1377	0.0223	0.0371	19.76	52	1	0.45			11.06	135.00	1.76			-0.07	47	3369	24.83	-0.2126	0.0216	0.1019	-0.0305	17.6%	13.4%			
-0.0349	0.1959	0.0321	0.0569	19.53	319	5	0.22			7.25	130.00	3.24			-0.01	75	2411	24.54	-0.3378	0.0268	0.2039	-0.0375	34.0%	22.9%			
-0.0364	0.2229	0.0290	0.5169	18.28	2036	20	0.05			4.16	135.00	5.06			-0.40	71	811	22.61	-0.4838	0.0328	0.2228	-0.0369	53.3%	33.9%			
-0.0384	0.2013	0.0364	0.3249	17.68	2665	126	0.04			2.02	140.00	8.38	8.50	8.35	-0.27	7	205	24.46	-0.6251	0.0284	0.2130	-0.0373	71.2%	46.0%			
-0.0209	0.1426	0.0262	0.1720	17.43	1528	94	0.05			0.87	145.00	12.50			0.00	0	101	27.01	-0.7254	0.0229	0.1888	-0.0357	84.6%	43.6%			

Options Terminology

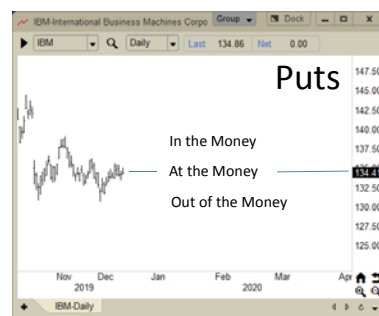
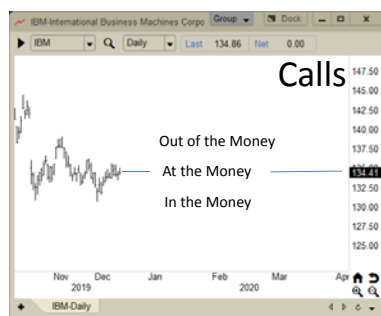
The option strike price is the price where your right to buy or sell the underlying market is.

If you own a \$100 Strike Call this gives you the right but not the obligation to buy the stock at \$100 a share.

If you own a \$100 Strike Put this gives you the right but not the obligation to sell the stock at \$100 a share.

Options Terminology

Moneyness refers to where Strike Prices are in comparison with the underlying stock.



Options Terminology

A good way to remember this.

ITM Call Options have Delta's $> .50$
ATM Call Options have Delta's near $.50$
OTM Call Options have Delta's $< .50$

ITM Put Options have Delta's $< -.50$
ATM Put Options have Delta's near $-.50$
OTM Put Options have Delta's $> .50$

Options Terminology

Expiration:

All options have expiration dates, this is the date in which your right to purchase or sell the stock expires.

If you keep an option after it expires two things can occur. If the option expires ITM you will be assigned the stock, with a Call you would have a long stock position and with a Put you would have a short stock position.

An OTM option just expires with no value. For our purposes we will never let an option expire, we will be out of the trade before this occurs.

Options Terminology

The option premium is the price you'll pay to buy the option.

Each option contract controls 100 shares of stock, so if the premium is \$1.50 that is a per share price. Since the option is based on 100 shares you will pay \$150.00 for the option.

Options Terminology

Premium Price is controlled by a few variables such as:

Volatility

Time to Expiration

Moneyness

As all of the above increase, premium rises. As they decrease premium gets cheaper.

Options Terminology

Delta:

Measures the price change the option will make based on a \$1.00 move of the underlying stock/market.

For example, a Call Option has a delta of .50 and a premium of \$4.00. If the stock moves up \$1.00 in price the option premium will rise to \$4.50, if the stock were to fall \$1.00 the premium will drop to \$3.50.

Options Terminology

Delta:

A Put option works the same way, for example, a Put has a delta of - .50 and a premium of \$2.00. If the stock moves down \$1.00 in price the option premium will rise to \$2.50, if the stock were to rise \$1.00 the premium will drop to \$1.50.

Call Delta's are positive, and Put Delta's are negative, this is based on the idea that if a stock rises a call will increase in price and a put will decrease in price.

Finding the Sweet Spot

A general belief in options trading is that the higher the delta and the longer the expiration the better off you are in the trade. While the longer expiration does give you more time, it also costs a lot more. This can significantly reduce your Rate of Return.

With strike prices many investors feel that the deeper in the money the strike price they buy the more money they can make. While this is true it also increases monetary risk and lowers overall ROI.

The goal is to pay just enough and have the right amount of time. Not too much and not too little.

Let's take a look at this.

Options Trading – Case Study

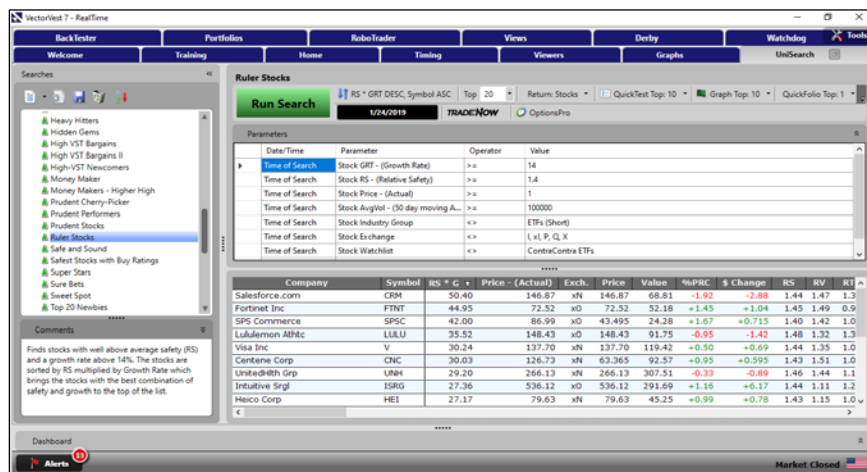
Date: 1/24/2019

Situation: DEW Up

Search: Ruler Stocks

1. Click on the UniSearch tab.
2. Click on Searches – Prudent, then Ruler Stocks
3. Run Search on 01/24/2019

Options Trading – Case Study



Options Trading – Case Study



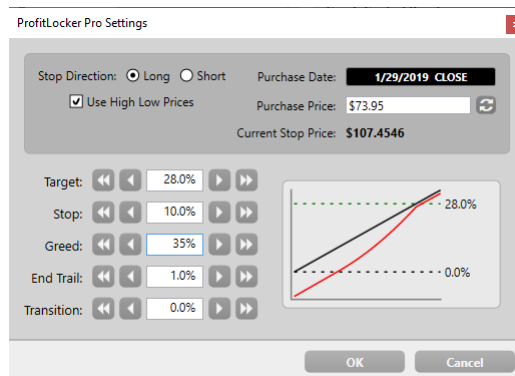
Finding the Sweet Spot

To optimize your capital choose an option with a Delta range $> .50 - .60$ that expires the closest to the 60-90 Day Range. This allows you to reduce your trade cost which increases your Rate of Return and is a more efficient use of your capital.

Let's test this idea.

Options Trading – Case Study

To manage the trade we will be using the ProfitLocker Pro



Options Trading – Case Study

The Trade is taken on 1/24/2019 based on the closing price and exited on 3/4/2019 when we cross the ProfitLocker Stop



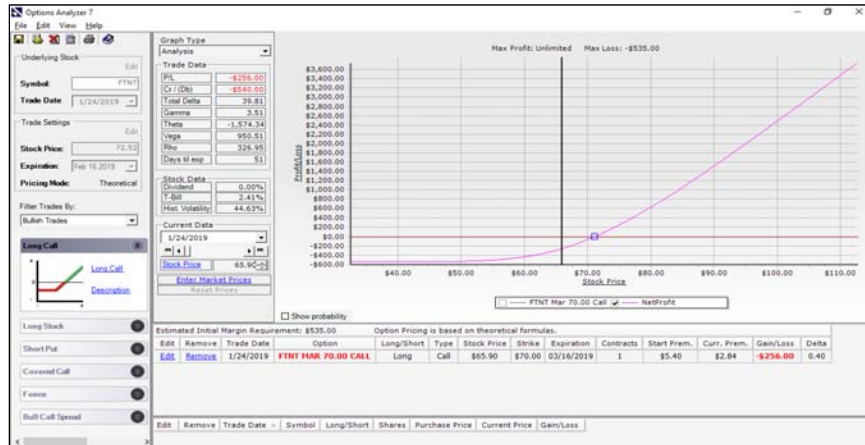
Options Trading – Case Study

The closest expiration to 60-90 Days is March at 50 DTE.
The closest Delta is the 70.00 Strike at .62.

Strike	Delta	Gamma	Theta	Vol	Open Int	Implied Vol	Call Put	Delta	Gamma	Theta	Vol	Open Int	Implied Vol	Call Put	
Feb 15, 2019 (22 Days to expiration)															
63.00	0.33	0.0045	-0.0011	0.0271	0.7966	67.11	36	0	0.00	0.00	0.00	60.00	1.96	1.20	1.06
67.00	0.43	0.0090	-0.0022	0.0542	1.5932	134.22	72	0	0.00	0.00	0.00	70.00	2.61	2.40	2.40
71.00	0.53	0.0135	-0.0033	0.0813	2.3864	201.33	108	0	0.00	0.00	0.00	80.00	3.26	3.20	3.20
75.00	0.62	0.0180	-0.0044	0.1080	3.1800	268.44	144	0	0.00	0.00	0.00	90.00	3.91	3.80	3.80
79.00	0.71	0.0225	-0.0055	0.1350	3.9750	335.55	180	0	0.00	0.00	0.00	100.00	4.56	4.40	4.40
83.00	0.80	0.0270	-0.0066	0.1620	4.7700	402.66	216	0	0.00	0.00	0.00	110.00	5.21	5.00	5.00
87.00	0.89	0.0315	-0.0077	0.1890	5.5650	469.81	252	0	0.00	0.00	0.00	120.00	5.86	5.60	5.60
91.00	0.98	0.0360	-0.0088	0.2160	6.3600	536.96	288	0	0.00	0.00	0.00	130.00	6.51	6.20	6.20
95.00	1.00	0.0375	-0.0090	0.2250	6.7500	573.75	300	0	0.00	0.00	0.00	135.00	6.75	6.50	6.50
Mar 15, 2019 (50 Days to expiration)															
63.00	0.23	0.0034	-0.0008	0.0204	0.7641	46.02	144	0	0.00	0.00	0.00	60.00	1.60	1.00	1.00
67.00	0.36	0.0068	-0.0016	0.0326	0.8209	43.31	793	27	0.00	0.00	0.00	70.00	2.10	1.30	1.30
71.00	0.49	0.0102	-0.0022	0.0448	0.8777	40.60	144	0	0.00	0.00	0.00	80.00	2.60	1.60	1.60
75.00	0.62	0.0136	-0.0033	0.0570	0.9345	37.89	793	27	0.00	0.00	0.00	90.00	3.10	1.80	1.80
79.00	0.75	0.0170	-0.0044	0.0692	0.9913	35.18	144	0	0.00	0.00	0.00	100.00	3.60	2.00	2.00
83.00	0.88	0.0204	-0.0055	0.0814	1.0481	32.47	144	0	0.00	0.00	0.00	110.00	4.10	2.10	2.10
87.00	0.97	0.0238	-0.0066	0.0936	1.1049	29.76	144	0	0.00	0.00	0.00	120.00	4.60	2.20	2.20
91.00	1.00	0.0250	-0.0068	0.0990	1.1400	28.50	144	0	0.00	0.00	0.00	125.00	4.75	2.25	2.25
Jun 21, 2019 (148 Days to expiration)															
63.00	0.13	0.0021	-0.0001	0.0126	0.4270	16	0	0	0.00	0.00	0.00	60.00	0.80	0.80	0.80
67.00	0.20	0.0042	-0.0002	0.0252	0.8540	32	0	0	0.00	0.00	0.00	70.00	1.10	1.10	1.10
71.00	0.27	0.0063	-0.0003	0.0378	1.2810	48	0	0	0.00	0.00	0.00	80.00	1.40	1.40	1.40
75.00	0.34	0.0084	-0.0004	0.0504	1.7080	64	0	0	0.00	0.00	0.00	90.00	1.70	1.70	1.70
79.00	0.41	0.0105	-0.0005	0.0630	2.1350	80	0	0	0.00	0.00	0.00	100.00	2.00	1.80	1.80
83.00	0.48	0.0126	-0.0006	0.0756	2.5620	96	0	0	0.00	0.00	0.00	110.00	2.30	1.90	1.90
87.00	0.55	0.0147	-0.0007	0.0882	2.9890	112	0	0	0.00	0.00	0.00	120.00	2.60	2.00	2.00
91.00	0.62	0.0168	-0.0008	0.1008	3.4160	128	0	0	0.00	0.00	0.00	130.00	2.90	2.10	2.10
95.00	0.69	0.0189	-0.0009	0.1134	3.8430	144	0	0	0.00	0.00	0.00	140.00	3.20	2.20	2.20
99.00	0.76	0.0210	-0.0010	0.1260	4.2700	160	0	0	0.00	0.00	0.00	150.00	3.50	2.30	2.30
103.00	0.83	0.0231	-0.0011	0.1386	4.6970	176	0	0	0.00	0.00	0.00	160.00	3.80	2.40	2.40
107.00	0.90	0.0252	-0.0012	0.1512	5.1240	192	0	0	0.00	0.00	0.00	170.00	4.10	2.50	2.50
111.00	0.97	0.0273	-0.0013	0.1638	5.5510	208	0	0	0.00	0.00	0.00	180.00	4.40	2.60	2.60
115.00	1.00	0.0285	-0.0014	0.1764	5.9780	224	0	0	0.00	0.00	0.00	190.00	4.70	2.70	2.70

Options Trading – Case Study

To purchase the call we pay \$540.00, our Max Loss using the ProfitLocker Pro stop of \$65.90 is \$256.00. Another advantage of options is your risk is capped at \$540.00.



Options Trading – Case Study

We exit the trade on March 4, when the ProfitLocker stops us out for a gain of \$848.00



Options Trading – Case Study

Scenario 1:

Using the Sweet Spot.

Option Cost - \$540.00

Max Loss - \$256.00

Ending Gain - \$848.00

ROI of 157%

Options Trading – Case Study

Next let's test a deep in the money call
using the same expiration.

Delta near .80

Options Trading – Case Study

The \$65.00 Call has a Delta of .76 and a cost of \$9.50 or \$950.00 per contract.

Option Chain: FTNT

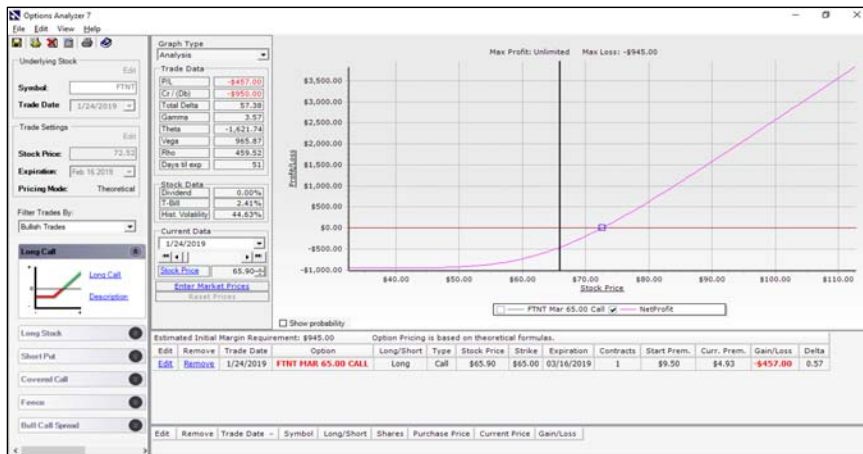
FTNT Last: 72.52 Net: 16.25 5 Day HV: 17.00 20 Day HV: 30.25 60 Day HV: 29.00 90 Day HV: 30.00 CIV Calls: 26.50 CIV Puts: 26.50

Spread: Multiple Expirations 2 Strikes Above and Below ATM Look Back: as of 01/24/19

Calls													Puts												
Brk/Even	ITM	Theta	Vega	Gamma	Delta	IV	OI	Vol	Net	Bid	Ask	Last	Strike	Last	Ask	Bid	Net	Vol	OI	IV	D				
Feb 15, 2019 (22 days till expiration)																									
Mar 15, 2019 (50 days till expiration)																									
45.6%	86.4%	-0.0313	0.0600	0.0159	0.8617	51.54	573	3		13.40	13.90	13.63	60.00	0.90	1.00	0.85		10	339	48.93	-0.1				
43.1%	73.5%	-0.0384	0.0635	0.0244	0.7641	46.62	144	0		9.30	9.70	0.00	65.00	1.70	1.80	1.65		7	1281	44.37	-0.2				
38.6%	57.6%	-0.0448	0.1032	0.0326	0.6200	43.31	793	27		5.80	6.20	5.91	70.00	3.20	3.40	3.10		2	333	41.66	-0.2				
31.7%	41.6%	-0.0444	0.1072	0.0353	0.4468	41.51	552	21		3.30	3.60	3.50	75.00	0.00	5.80	5.50		0	2791	39.45	-0.1				
23.5%	27.7%	-0.0368	0.0920	0.0311	0.2844	40.34	533	16		1.70	1.90	1.75	80.00	0.00	9.20	8.80		0	749	37.93	-0.1				
15.7%	17.2%	-0.0264	0.0667	0.0228	0.1627	39.94	232	2		0.80	0.95	0.90	85.00	0.00	13.40	12.80		0	166	36.93	-0.1				
Jun 21, 2019 (148 days till expiration)																									

Options Trading – Case Study

To purchase the call we pay \$950.00, our Max Loss using the ProfitLocker Pro stop of \$65.90 is \$457.00.



Options Trading – Case Study

We exit the trade on March 4, when the ProfitLocker stops us out for a gain of \$937.00



Options Trading – Case Study

Scenario 2:

Deep In-The-Money Call

Option Cost - \$950.00

Max Loss - \$457.00

Ending Gain - \$937.00

ROI of 101%

Options Trading – Case Study

Now let's test a longer expiration...

DTE = 148

Options Trading – Case Study

The \$70.00 Call has a Delta of .60 and a cost of \$8.87 or \$887.00 per contract.

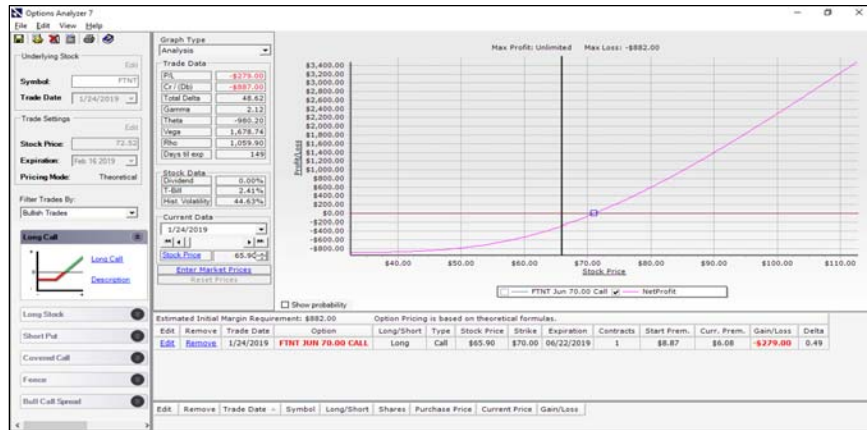
Option Chain: FINT

Multiple Expirations | 2 Strikes | Above and Below | ATM | Look Back: as of 01/24/19

Calls														Puts							
Bk/Even	ITM	Theta	Vega	Gamma	Delta	IV	OI	Vol	Net	Bid	Ask	Last	Strike	Last	Ask	Bid	Net	Vol	OI	IV	D
Feb 15, 2019 (22 days till expiration)																					
Mar 15, 2019 (50 days till expiration)																					
Jun 21, 2019 (148 days till expiration)																					
43.6%	73.3%	-0.0205	0.1321	0.0139	0.7938	44.40	33	0		15.10	15.80	0.00	60.00	0.00	2.45	2.25		0	70	41.17	-0.1
41.0%	63.6%	-0.0237	0.1591	0.0175	0.7085	42.70	16	0		11.60	12.20	0.00	65.00	0.00	3.80	3.50		0	151	39.05	-0.2
37.6%	53.9%	-0.0259	0.1779	0.0204	0.6090	40.55	66	1		8.60	9.00	8.87	70.00	0.00	5.70	5.30		0	114	37.31	-0.3
33.9%	44.4%	-0.0249	0.1848	0.0221	0.5005	39.08	616	30		6.10	6.40	6.20	75.00	0.00	8.10	7.80		0	75	35.91	-0.1
29.4%	35.9%	-0.0236	0.1785	0.0217	0.3946	38.47	91	0		4.20	4.50	0.00	80.00	0.00	11.20	10.80		0	19	34.75	-0.0
24.7%	28.5%	-0.0207	0.1607	0.0200	0.2382	37.60	83	0		2.75	3.10	0.00	85.00	0.00	14.80	14.40		0	10	33.71	-0.0

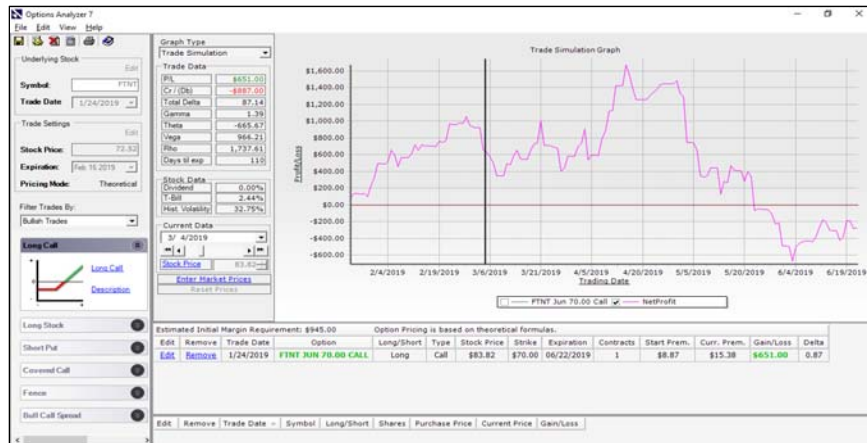
Options Trading – Case Study

To purchase the call we pay \$887.00, our Max Loss using the ProfitLocker Pro stop of \$65.90 is \$279.00.



Options Trading – Case Study

We exit the trade on March 4, when the ProfitLocker stops us out for a gain of \$651.00



Options Trading – Case Study

Scenario 3:

Extended Expiration

Option Cost - \$887.00

Max Loss - \$279.00

Ending Gain - \$651.00

ROI of 73%

Options Trading – Case Study

Summary:

The Sweet Spot is the most efficient use of capital.

	Trade Cost	Max Loss	Real Gain	ROI
Sweet Spot	\$540.00	\$256.00	\$848.00	157%
Higher Delta	\$950.00	\$457.00	\$937.00	101%
Longer Expiration	\$887.00	\$279.00	\$651.00	73%
Long Stock	\$7252.00	\$663.00	\$1268.00	17%

Options Trading – Case Study

The argument for extended expiration comes down to, “What Ifs.” What if the stock keeps going up and I am not at a target or stopped out.

It’s simple...

Options Trading – Case Study

Exit your option with profits and purchase another within the Sweet Spot.

The best time to do this is 2-3 Weeks before your option expires. This negates any Time Decay effects.

The goal as always is to use your capital efficiently.

Finding the Sweet Spot

We use the same ranges for Put Trades on bearish markets/stocks

Delta range $< -.50 - (-.60)$ that expires the closest to the 60-90 Day Range.

Options Trading – Case Study

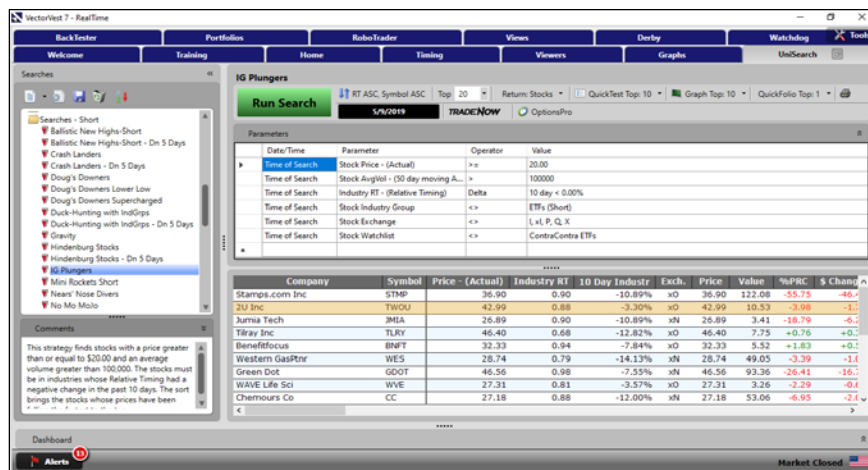
Date: 05/09/2019

Situation: DEW Down

Search: IG Plungers

1. Click on the UniSearch tab.
2. Click on Searches – Short, then IG Plungers
3. Run Search on 05/09/2019

Options Trading – Case Study

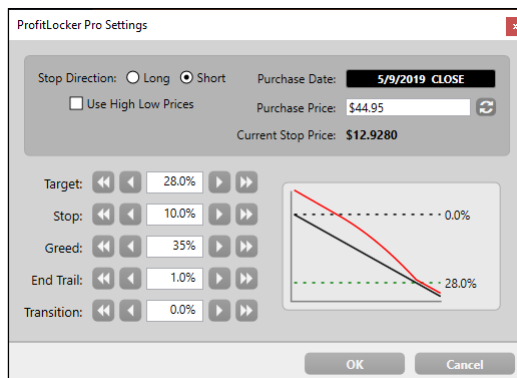


Options Trading – Case Study



Options Trading – Case Study

We use the same ProfitLocker Pro settings:



Options Trading – Case Study

Our initial stop is \$47.28



Options Trading – Case Study

Stop is hit on June 17, 2019 at \$36.41



Options Trading – Case Study

The July 19, 2019 \$45.00 Put meets our requirements.

DTE = 71

Delta = -0.55

Option Chain: TWOU

TWOU Last: 42.99 Net: 35.75 5 Day HV: 39.75 20 Day HV: 47.75 60 Day HV: 51.00 90 Day HV: 56.75 CV Calls: 56.75 CV Puts: 45.75

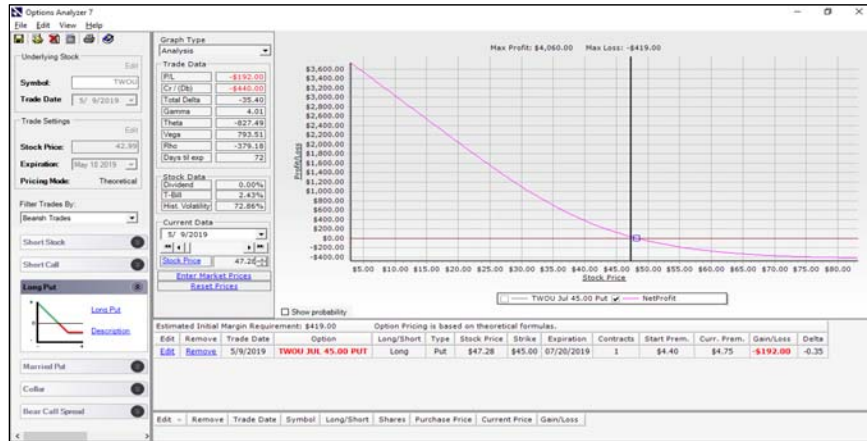
2U INC

Jul 19, 2019 2 Strikes Above and Below Saver Strikes Look Back as of 05/09/19

Calls													Puts									
IV	OI	Vol	Net	Bid	Ask	Last	Strike	Last	Ask	Bid	Net	Vol	OI	IV	Delta	Gamma	Vega	Theta	ITM	Bk/Even		
Jul 19, 2019 (71 days till expiration)																						
89.98	1	0	13.00	15.90	0.00	30.00	0.50	0.65	0.40			4	62	65.22	-0.0817	0.0122	0.0289	-0.0130	14.4%	13.2%		
60.53	0	0	9.10	9.60	0.00	35.00	0.85	1.15	0.95			20	30	55.17	-0.1665	0.0238	0.0477	-0.0182	27.3%	24.4%		
50.82	9	0	5.30	5.60	0.00	40.00	2.18	2.25	2.05			6	28	47.11	-0.3246	0.0402	0.0687	-0.0223	41.9%	35.6%		
46.87	120	24	2.65	2.85	3.10	45.00	4.40	4.60	4.30			39	172	42.77	-0.5560	0.0487	0.0754	-0.0220	55.9%	43.7%		
45.55	95	20	1.15	1.35	1.20	50.00	7.93	8.30	7.80			14	85	43.15	-0.7560	0.0386	0.0602	-0.0175	67.8%	47.5%		
48.18	98	21	0.55	0.75	0.60	55.00	0.00	12.50	12.00			0	83	38.78	-0.9132	0.0223	0.0312	-0.0076	77.2%	49.8%		

Options Trading – Case Study

Trade Cost of \$440.00 with a Max Loss of \$192.00



Options Trading – Case Study

We exit the trade on June 17, when the ProfitLocker stops us out for a gain of \$532.00



VectorVest - Trader Track

Options Trading

11:30 AM – 12:15 PM

The Ultimate Retirement Solution

The Ultimate Retirement Solution is a coaching group that promotes using options to create trades that give you a high probability of success to create income.

This allows you to be wrong on trade direction but still profitable on the trade.

Let's take a look at one of our core trades that achieves this idea.

The Ultimate Retirement Solution

We will build on the core principles that we just learned to choose a call or put to buy.

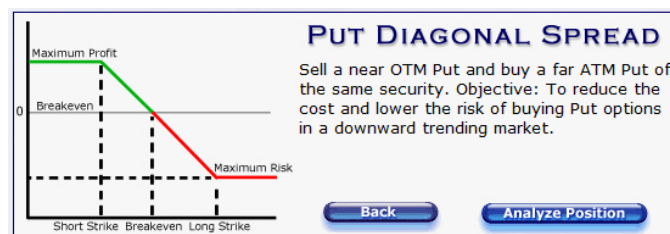
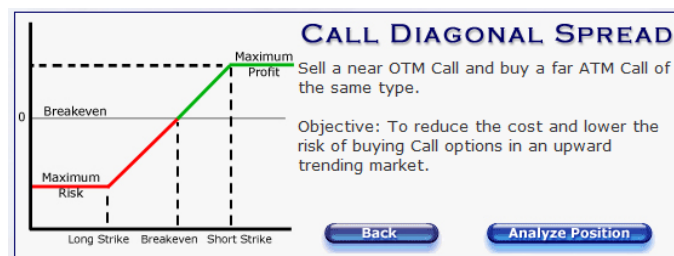
But we will also simultaneously sell an option along with it, this allows us to make money even if we are wrong on direction.

This trade is called a Bull Call Diagonal or a Bear Put Diagonal. We also refer to these as Synthetic Covered Calls or Puts.

The Ultimate Retirement Solution

Again, this trade is very similar to a Covered Call/Put but will dramatically decrease the cost and increase the ROI.

The Diagonal Spread



The Setup

Our long option will have a DTE of nearest to 60-90 Days with a Delta closest to the range of $>.50$ to $.60$.

Our short option (the sell) will have an expiration anywhere from 25 - 45 Days with a Delta range of $.30$ to $.50$.

****The expirations should never be in the same month.****

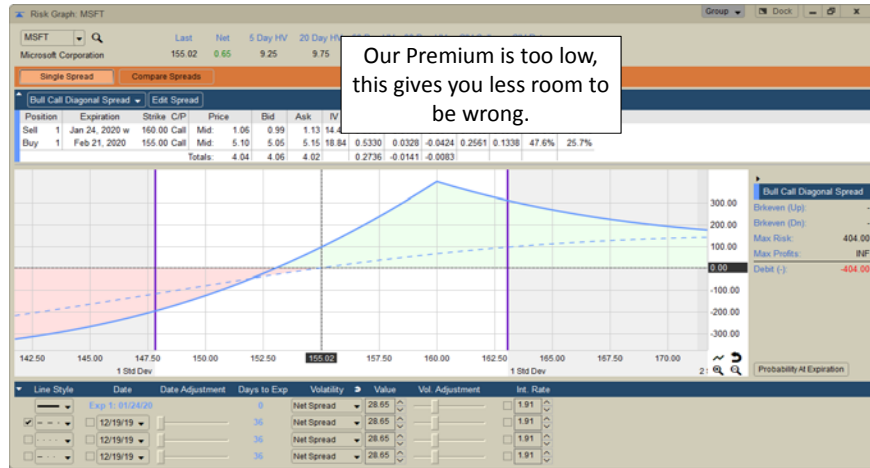
The guidelines are the same for the Put trade.

The Setup

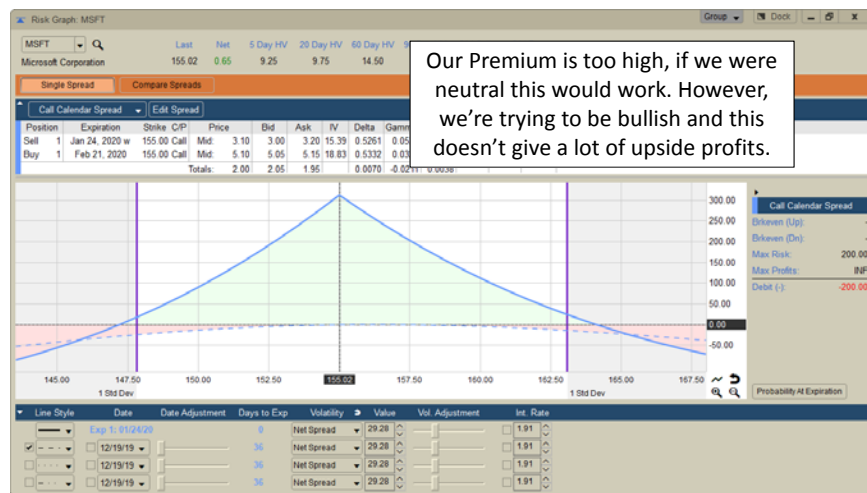
To optimize the trade for maximum probability we want the short option to be at least $1/3^{\text{rd}}$ the cost of the long option but not too much higher.

This is the sweet spot.

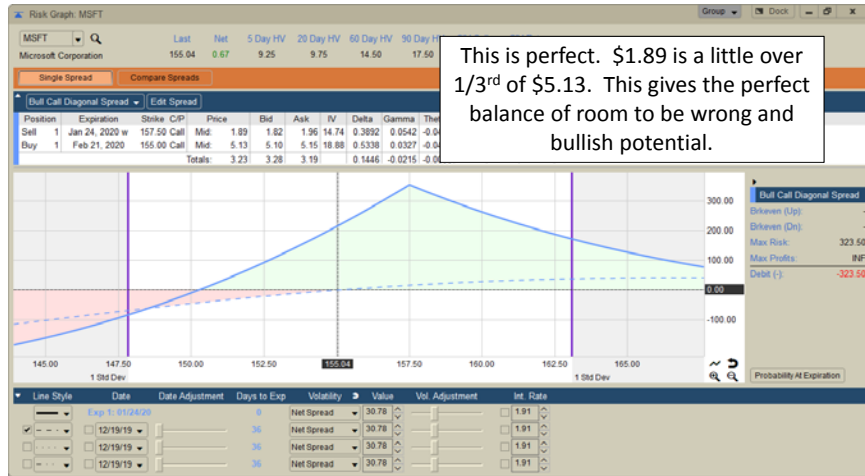
The Setup



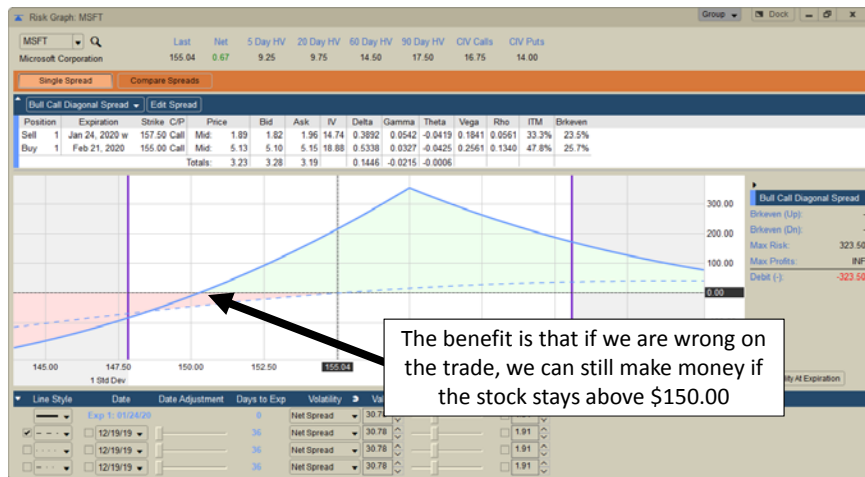
The Setup



The Setup



The Setup



Options Trading – Case Study

Date: 11/08/2019

Situation: DEW Up

Search: Premier Growth Stocks

1. Click on the UniSearch tab.
2. Click on Searches – Retirement
3. Run Search on 11/08/2019

Options Trading – Case Study

The screenshot displays the VectorVest 7 - RealTime software interface. The main window is titled "Premier Growth Stocks" and shows a "Run Search" button. Below the search parameters, a table lists the results of the search. The table has the following columns: Company, Symbol, VST*RT*, Price - (Actual), Exch., Price, Value, %PRC, \$ Change, RS, and RV. The results are as follows:

Company	Symbol	VST*RT*	Price - (Actual)	Exch.	Price	Value	%PRC	\$ Change	RS	RV
Charter Comm	CHTR	2.36	469.75	xO	469.75	281.63	+0.28	+1.31	1.35	1.23
Sun Life Finl	SLF	2.35	46.25	xN	46.25	61.92	-0.11	-0.05	1.23	1.42
J P Morgan Chs	JPM	2.34	130.38	xN	130.38	166.77	+0.29	+0.38	1.28	1.42
ICICI BRADR	IBN	2.32	13.58	xN	13.58	12.21	+2.26	+0.30	0.91	1.22
CDW Corporation	CDW	2.29	133.52	xO	133.52	148.69	+0.44	+0.59	1.34	1.40
Microsoft	MSFT	2.28	145.96	xO	145.96	109.03	+1.18	+1.70	1.35	1.22
KeyisgE Tech	KEYS	2.27	105.25	xN	105.25	99.88	+1.48	+1.53	1.04	1.17
Transidom Grp	TGG	2.22	541.08	xN	541.08	559.34	+0.52	+2.78	1.40	1.41
Copart Inc	CPRT	2.21	81.46	xO	81.46	69.37	-0.20	-0.16	1.47	1.32

Options Trading – Case Study



Options Trading – Case Study

Option Chain: MSFT

MSFT Last Net 5 Day HV 20 Day HV 60 Day HV 90 Day HV CIV Calls CIV Puts
MICROSOFT CORP 145.96 9.25 9.75 14.50 17.50 16.75 14.00

Multiple Expirations 3 Strikes Above and Below ATM Look Back: as of 11/08/19

Calls													Puts												
Bk/Even	ITM	Theta	Vega	Gamma	Delta	IV	OI	Vol	Net	Bid	Ask	Last	Strike	Last	Ask	Bid	Net	Vol	OI	IV	D				
Dec 20, 2019 (42 days till expiration)																									
48.7%	97.2%	0.0000	0.0000	0.0278	0.9722	0.00				03	130.00	0.30	0.30	0.29			405	10714	22.32	-0.4					
48.6%	89.9%	0.0000	0.0000	0.1006	0.8994	0.00				01	135.00	0.59	0.61	0.60			7361	23906	20.03	-0.4					
44.3%	74.7%	-0.0256	0.1373	0.0373	0.8074	14.72	20955	2932		6.85	6.90	7.25	140.00	1.32	1.36	1.34	1555	9958	18.36	-0.2					
37.4%	53.0%	-0.0346	0.1969	0.0541	0.5206	14.4	22527	4550		1.20	3.50	3.57	145.00	0.35	2.94	2.91	1129	5251	17.19	-0.4					
25.9%	31.0%	-0.0297	0.1745	0.0450	0.3012	14.19	44306	3779		1.31	1.35	1.33	150.00	0.80	5.95	5.75	90	6538	17.16	-0.4					
13.8%	14.7%	-0.0160	0.0964	0.0274	0.1131	14.03	8707	876		0.37	0.39	0.35	155.00	10.34	10.00	9.85	2	151	19.09	-0.4					
5.6%	5.7%	-0.0059	0.0357	0.0100	0.0314	14.11	3719	115		0.08	0.09	0.10	160.00	15.21	14.85	14.70	7	16	23.77	-0.4					
Jan 17, 2020 (70 days till expiration)																									
46.3%	92.8%	-0.0127	0.0825	0.0110	0.9345	18.10	31312	413		16.40	16.55	16.50	130.00	0.76	0.77	0.75	422	17934	22.22	-0.4					
44.2%	83.4%	-0.0213	0.1505	0.0201	0.8501	18.10	30389	578		12.00	12.15	12.25	135.00	1.33	1.34	1.33	536	21667	20.52	-0.4					
40.6%	69.0%	-0.0280	0.2144	0.0301	0.7062	17.32	45818	3893		8.00	8.10	8.20	140.00	0.33	2.37	2.35	1463	18089	19.12	-0.2					
34.7%	51.5%	-0.0313	0.2542	0.0361	0.5573	16.68	31733	1341		4.95	4.90	4.95	145.00	0.03	4.10	4.05	601	4604	18.01	-0.4					
26.8%	34.3%	-0.0282	0.2427	0.0371	0.3077	15.37	21002	1037		2.45	2.90	2.95	150.00	0.78	6.80	6.70	383	8273	17.48	-0.4					
17.8%	20.3%	-0.0200	0.1807	0.0286	0.2009	15.28	16406	1420		1.07	1.08	1.07	155.00	10.57	10.50	10.35	34	779	17.81	-0.4					
10.0%	10.6%	-0.0116	0.1067	0.0170	0.0916	15.11	11679	292		0.39	0.42	0.42	160.00	15.07	14.95	14.75	121	350	19.34	-0.4					

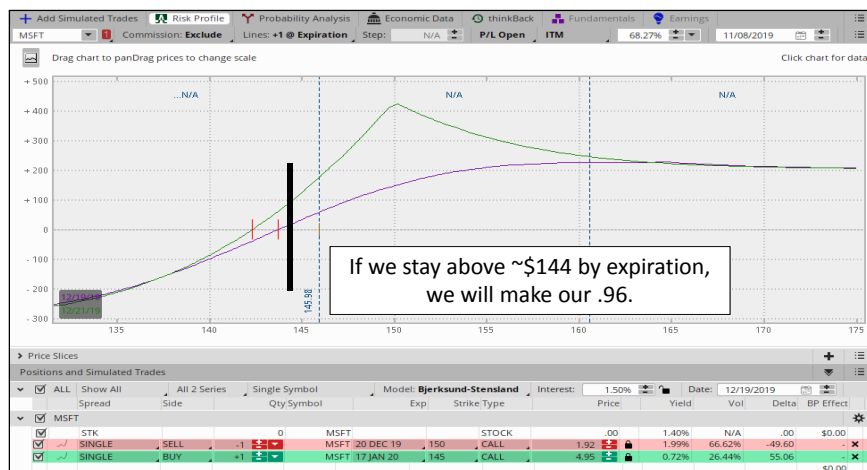
Use the SweetSpot

Options Trading – Case Study

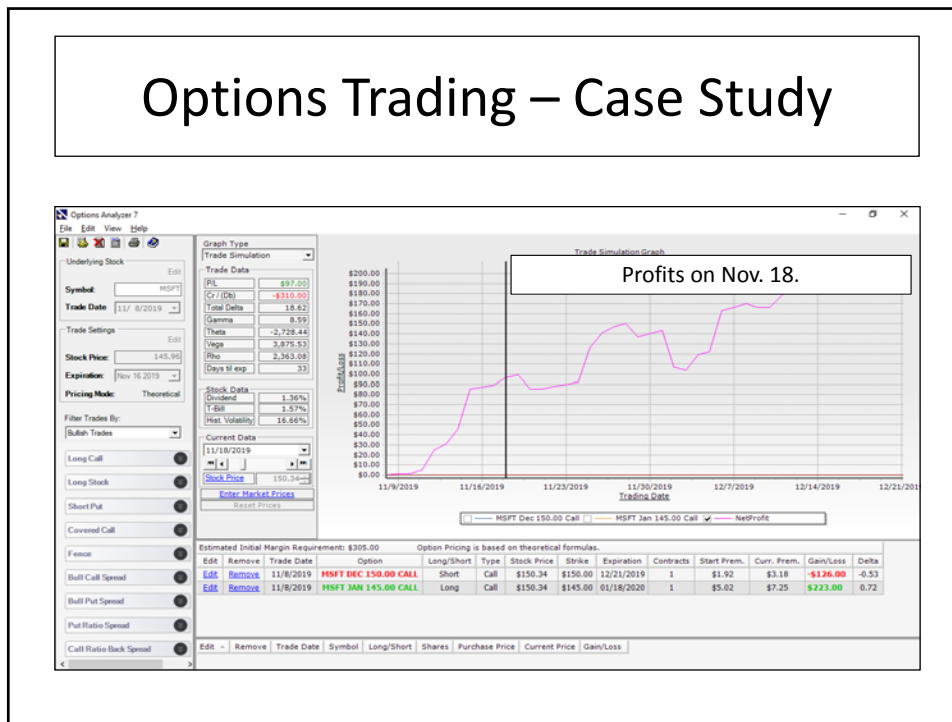
Our profit target is $\frac{1}{2}$ of the premium of the short option. We sold the Dec. 20 150 Call for \$1.92, this makes our profit target \$.96 or \$96.00 per contract.

This is also our stop; these trades are designed to have a 1:1 Reward to Risk Ratio.

Options Trading – Case Study



Options Trading – Case Study

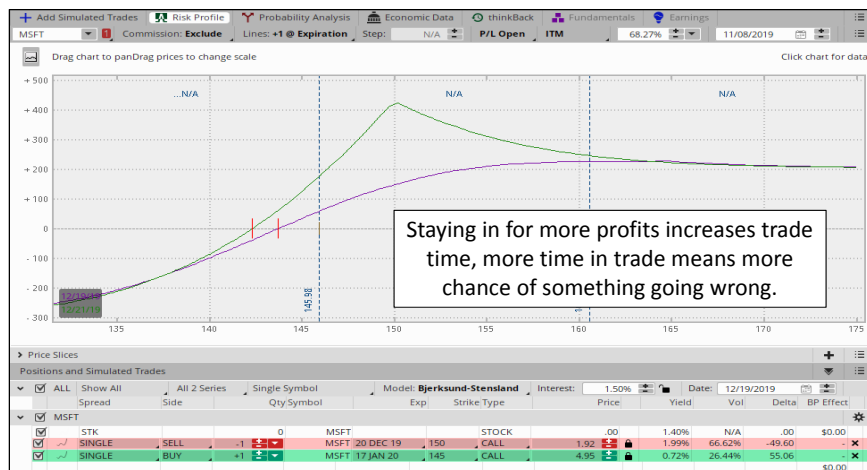


Options Trading – Case Study

I know what you are thinking, I could have made more if I held on.

History and testing has shown it's better to exit with profits and re-enter with a new trade at the sweet spot.

Options Trading – Case Study



Options Trading – Case Study

Trade Summary:

Our Cost: \$303.00

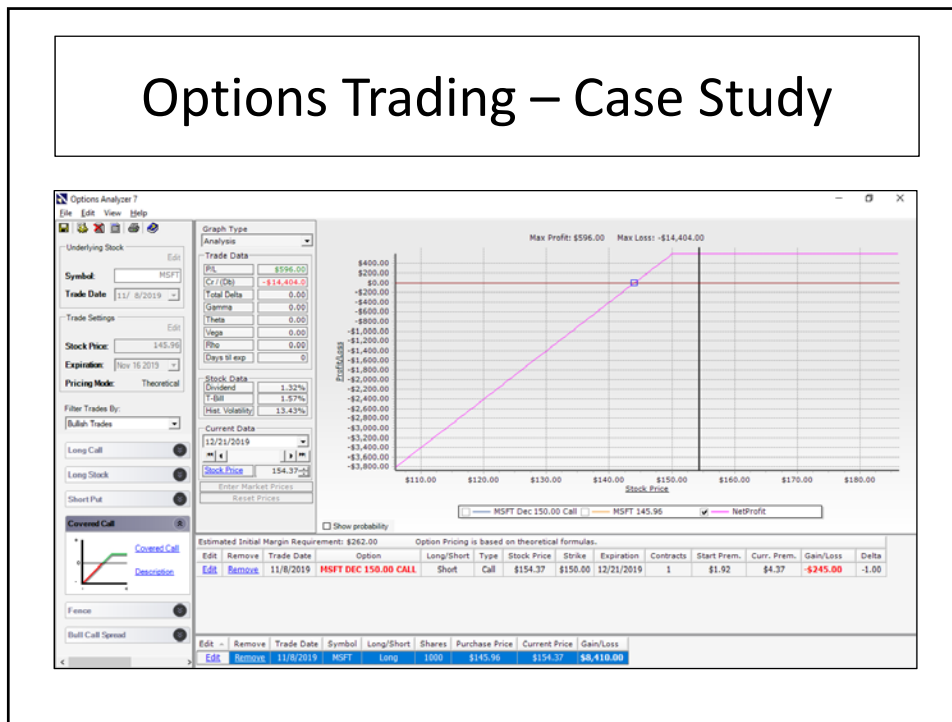
(Long Call – \$4.95) – (Short Call – \$1.92)

Our Profit: \$96.00

The ROI: 31.6%

Let's compare the Covered Call

Options Trading – Case Study

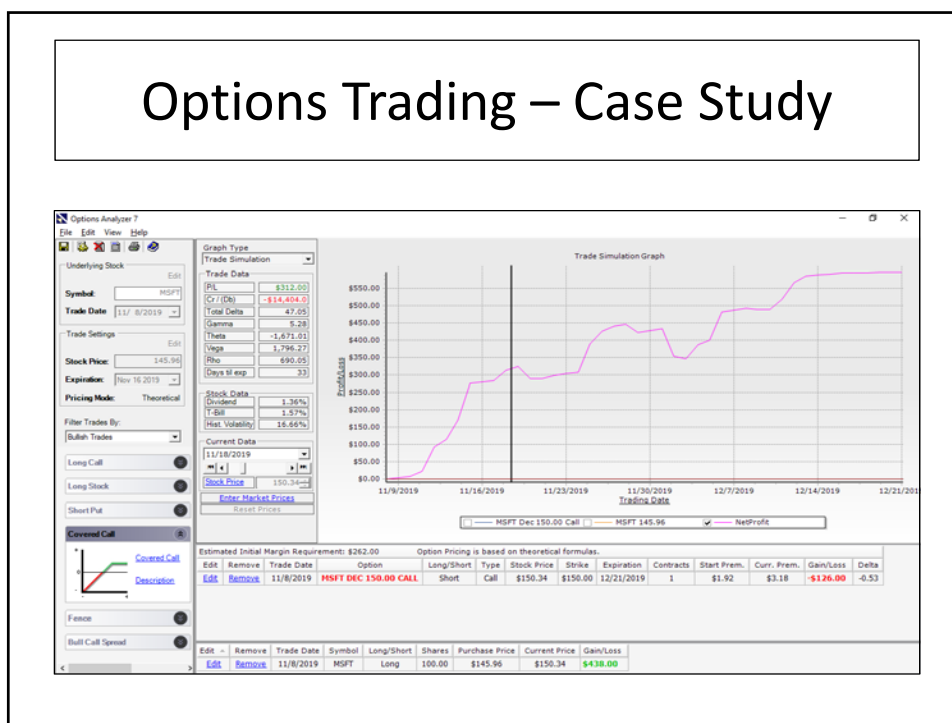


Options Trading – Case Study

100 Shares of MSFT = \$14,596.00
 Sell 1 150 Dec Call = (\$192.00)

Total Trade Cost = \$14,404

Options Trading – Case Study



Options Trading – Case Study

If we exit the trade on Nov. 18 the profit was \$312.00

If we held to expiration, we make \$596.00

Options Trading – Case Study

Trade Cost: \$14404.00

Max Profit: \$596.00

ROI: 4.1%

Trade Cost: \$14404.00

Nov. 18 Profit: \$312.00

ROI: 2.1%

Options Trading – Case Study

Diagonal Trade Summary:

Our Cost: \$303.00

(Long Call – \$4.95) – (Short Call – \$1.92)

Our Profit: \$96.00

The ROI: 31.6%

Options Trading – Case Study

The Covered Call is still a great way to generate income on your stock positions, however the Diagonal is an inexpensive way to play a stock bullish or bearish.

With the added bonus of probability.

Options Trading – Case Study

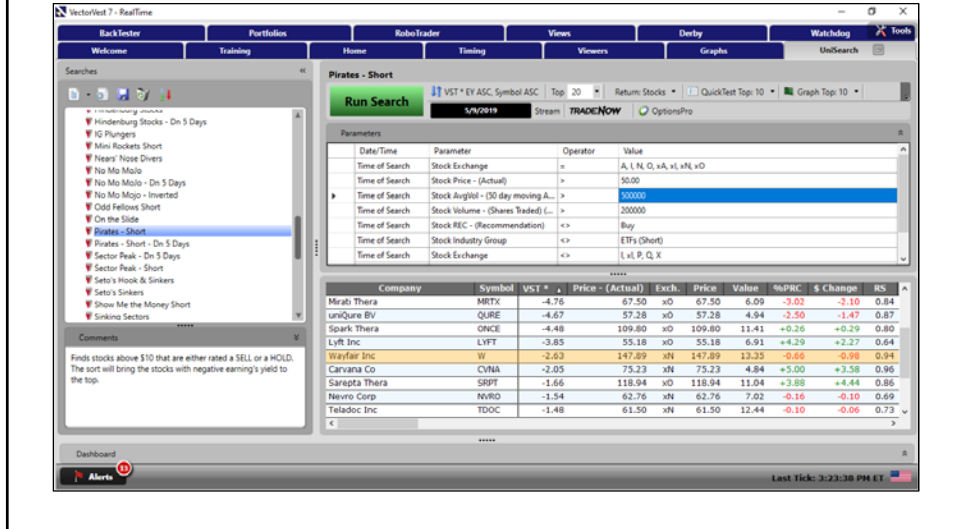
Date: 05/09/2019

Situation: DEW Down

Search: Vern's Vultures

1. Click on the UniSearch tab.
2. Click on Searches – Pirates - Short
3. Adjust stock price to > 50.00 per share
4. Run Search on 05/9/2019

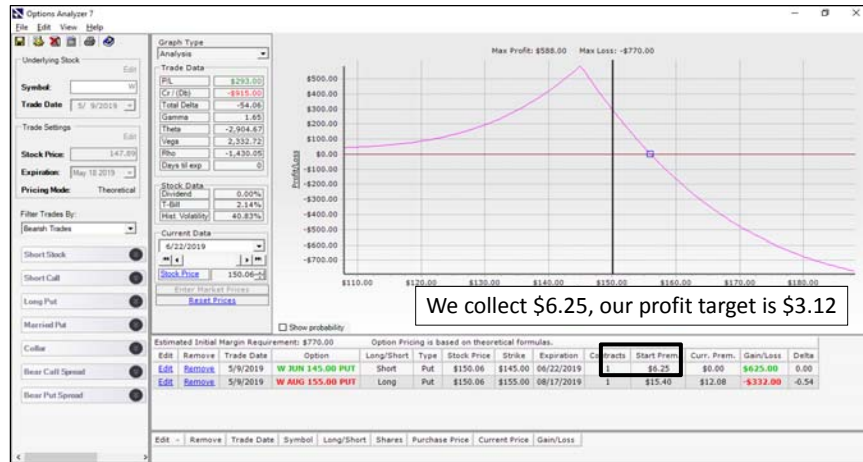
Options Trading – Case Study



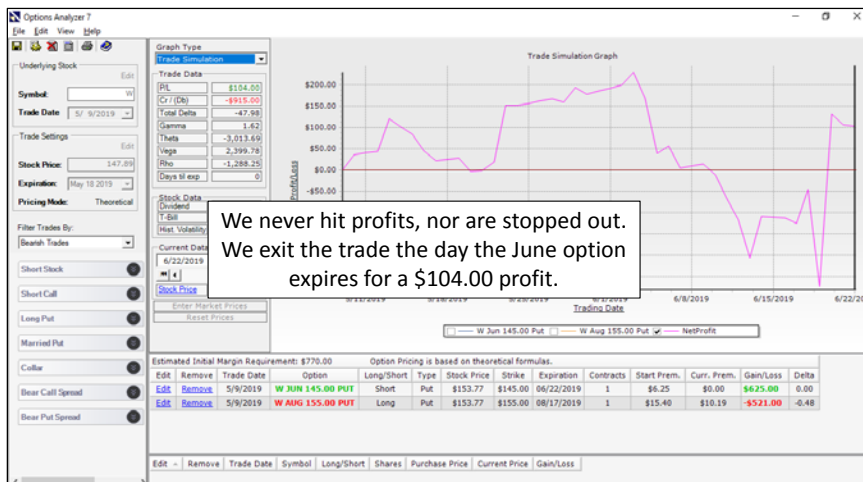
Options Trading – Case Study



Options Trading – Case Study



Options Trading – Case Study



Options Trading – Case Study



The Diagonal

Let's put one together.

Symbol: _____
Long Option: _____
Short Option: _____
Trade Cost: _____
Profit Target: _____
Stop: _____

VectorVest

SERVED LUNCH

12:15 PM – 1:15 PM

Day Two

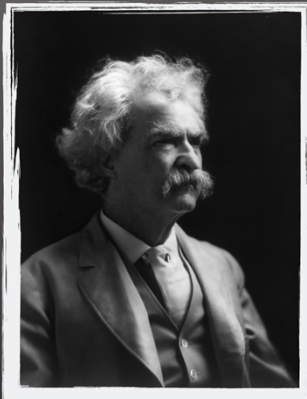
Afternoon Session

Closing General Sessions

Ultimate Retirement Solution

1:15 PM – 2:15 PM

The Ultimate Retirement Solution



"Don't just sit there and worry. Be proactive. Do something - anything - about what's worrying you so you can gain information, focus and control over the situation. I've suffered a great many catastrophes in my life. Most of them never happened."

Mark Twain



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“How do I keep from running out of money in retirement?”

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“Just keep making more money!”

~ Dr. Bart Diliddo ~

The Ultimate Retirement Solution

A Secure Retirement is one in which you have enough income to live the life you desire.



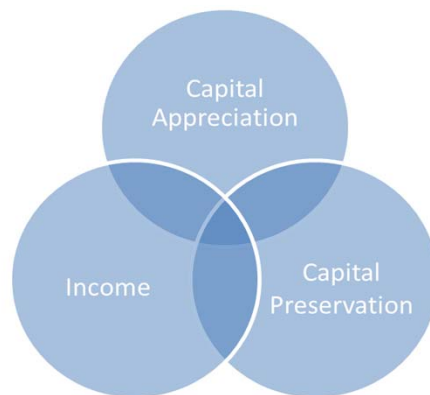
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Where Work is Optional, and Retirement is Affordable.



The Ultimate Retirement Solution

3 Core Strategies



The Ultimate Retirement Solution

Capital
Appreciation

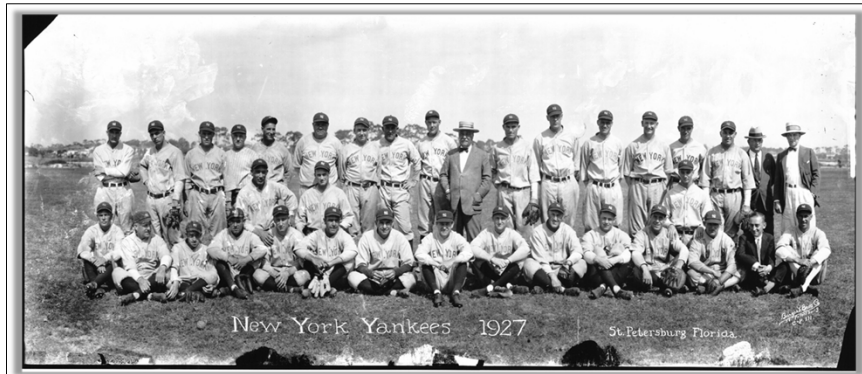
The Ultimate Retirement Solution

#1 Play it Safe



The Ultimate Retirement Solution

“Good portfolio management starts with buying the right stocks” - *Dr. Bart DiLiddo*



The Ultimate Retirement Solution

How It Works

BUY
HIGH RS STOCKS

DON'T
BUY STOCKS



SELL STOCKS
WHEN REC="S"

The Ultimate Retirement Solution

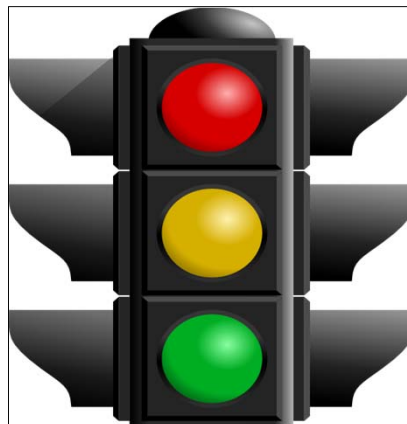
Relative Safety

An Indicator of Risk

Consistency and Predictability of Financial Performance
are the Primary Factors in Assessing Relative Safety.

The Ultimate Retirement Solution

Relative Safety



0.00 to 0.89 Poor

0.90 to 1.09 Fair

1.10 to 1.19 Good

1.20 to 1.39 Very Good

1.40 to 2.00 Excellent

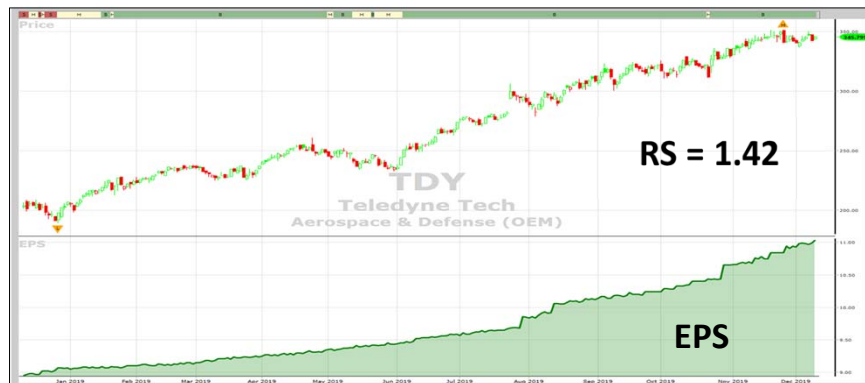
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Relative Safety

- Earnings Consistency
- Company Size
- Price Behavior
- Business Longevity
- Dividend History
- Debt to Equity Ratio

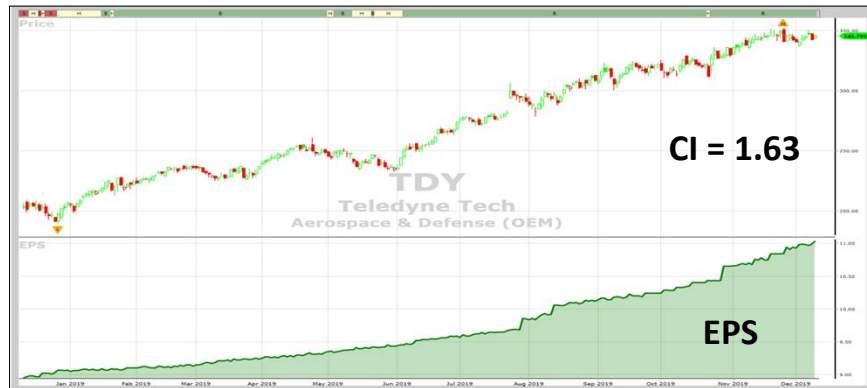
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RS = Earnings Consistency



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RS = Price Behavior



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RS= Price Behavior



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RS = Dividend History



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RS = Debt to Equity Ratio

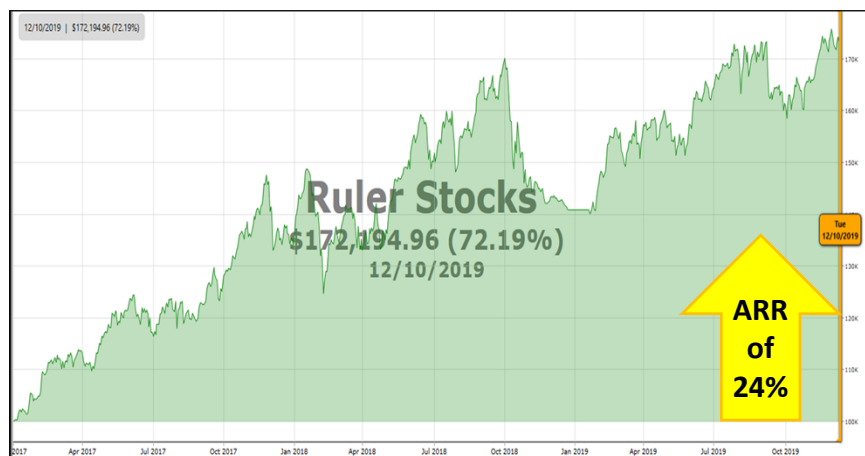
A measure of a company's financial leverage calculated by dividing the total liabilities by shareholders equity. It shows what proportion of equity and debt the company is using to finance its assets.

$$= \frac{\text{Total Liabilities}}{\text{Shareholders Equity}}$$

The Ultimate Retirement Solution



Ultimate Retirement Solution



The Ultimate Retirement Solution

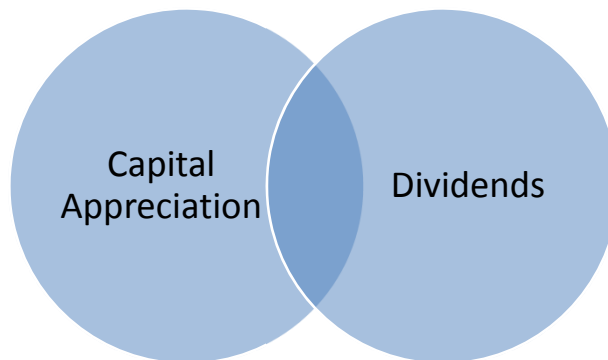
“Intelligent investment decisions cannot be made without including a knowledge of stock safety. Do not let stock safety be your *missing link*.”

Ultimate Retirement Solution

#2 Get Paid



The Ultimate Retirement Solution



Dividends & Distributions

“The best of all worlds...collecting dividend checks while prices of your stocks go up, comes from finding solid growth stocks that pay dividends. VectorVest is ideally suited to find these babies.”

- Dr. Bart DiLiddo, Page 42
Stocks, Strategies & Common Sense

Dividends & Distributions

Dividend:

A distribution of a portion of a company's earnings to shareholders.

Dividend Yield:

Amount a company pays out relative to its share price.

DY = Annual Dividends Per Share/Price Per Share.

Dividends & Distributions

Declaration Date: *Date on which the company announces the next dividend payment amount.*

Ex-Date: *Date before which you must own security in order to receive dividend.*

Record Date: *Date on which the company ensures dividend is paid to shareholders.*

Payout Date: *Date on which payments are made.*

Dividends & Distributions

VectorVest Dividend Indicators

DIV = Annual Dividend (\$)

DY = Dividend Yield (Annual)

DS = Dividend Safety

DG = Dividend Growth

YSG = Yield, Safety & Growth Vector

Dividends & Distributions

DS (Dividend Safety):

- An indicator of the assurance that regular cash dividends will be declared and paid at current or higher rates for the foreseeable future.
- Stocks with high DS values have shown consistently strong financial performance and including solid cash flow.

Dividends & Distributions

DG (Dividend Growth):

- A forecasted annual growth rate of a company's dividend based on historical dividend payments and dividend predictability.
- It is a subtle yet important indicator of a company's financial performance.
- It also provides some insight into the board's outlook and the company's ability to increase earnings.

Dividends & Distributions

YSG (Yield, Safety, Growth):

- An indicator that combines DY, DS and DG into a single value, and allows direct comparison of all dividend-paying stocks in the database.
- Stocks with the highest YSG values have the best combinations of Dividend Yield, Safety and Growth.
- These are the stocks to buy for regular income and long-term growth.

Dividends & Distributions

Dividend Reinvestment Plan



Dividends & Distributions

DRIP WatchLists

860 Companies with Dividend Reinvestment Plans

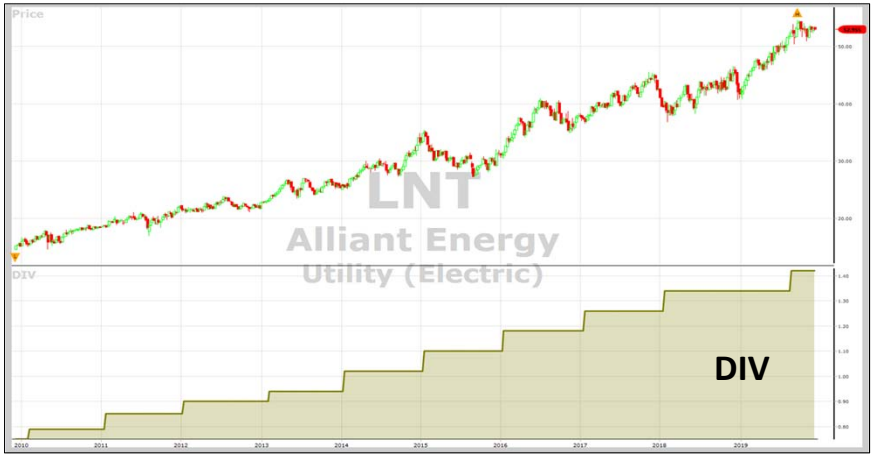
*ranked by Number of Years **Increasing** Dividend Payout*

5-9 Years

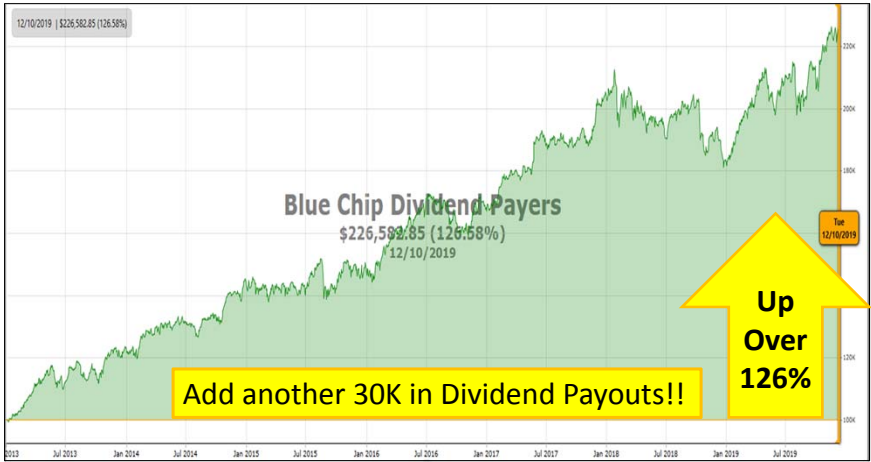
10-24 Years

25 + Years

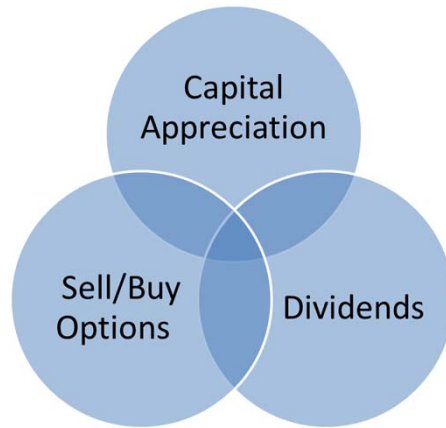
Dividends & Distributions



Blue Chip Dividend Payers



The Ultimate Retirement Solution



The Ultimate Retirement Solution



The Ultimate Retirement Solution

Learn Two Basic Option Strategies

Covered Call
Protective Put

The Ultimate Retirement Solution

The Collar trade

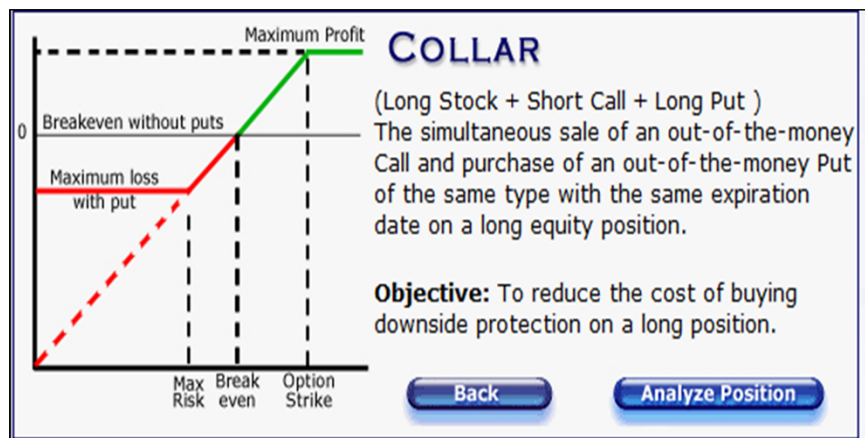
1. What is a Collar?
2. When & Why to Use
3. How to Set-up & Manage

The Ultimate Retirement Solution

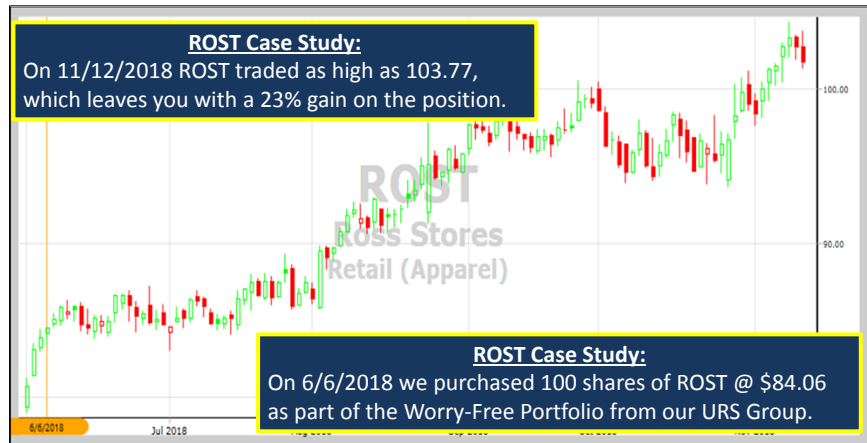
Best time to use a Collar

1. Large unrealized gains
2. Periods of market uncertainty

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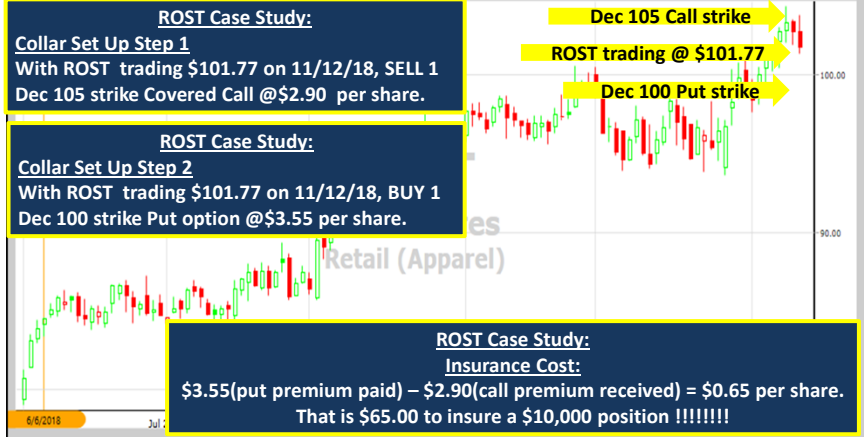
The Ultimate Retirement Solution



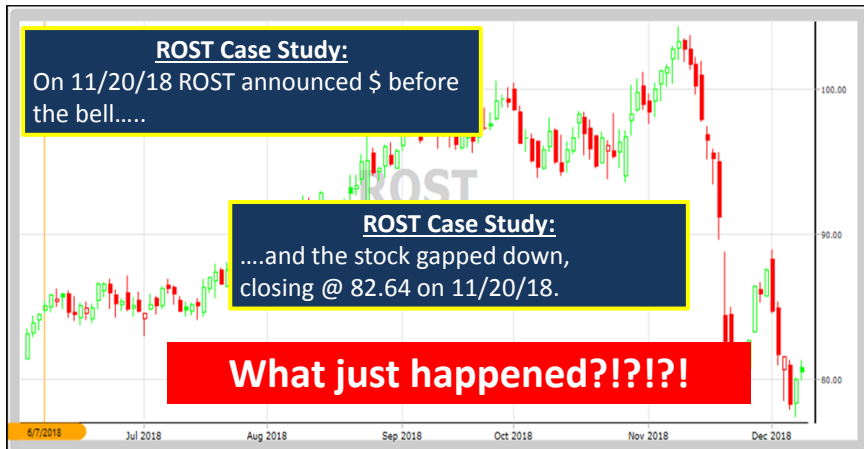
The Ultimate Retirement Solution



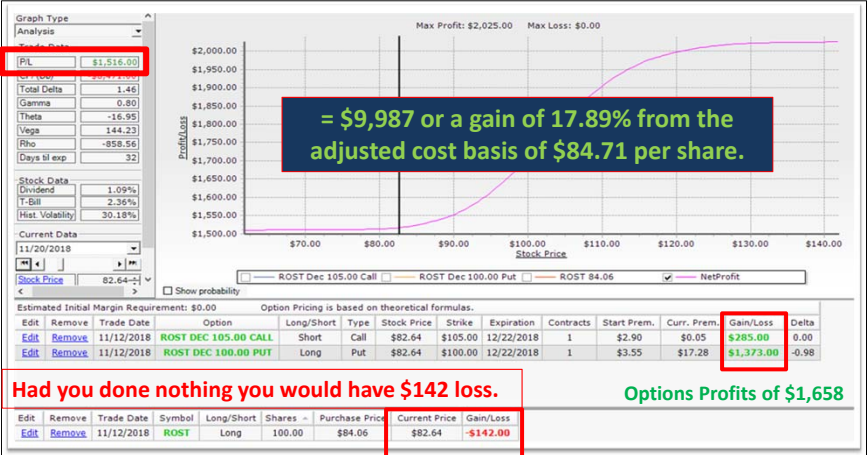
The Ultimate Retirement Solution



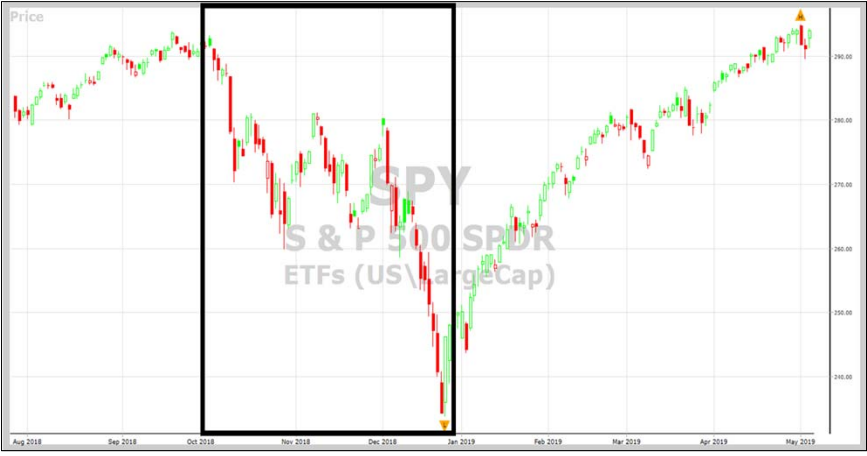
The Ultimate Retirement Solution



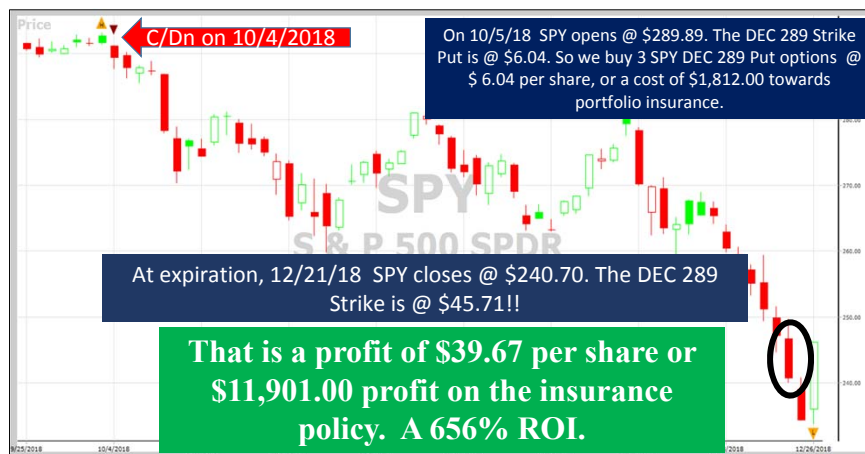
The Ultimate Retirement Solution



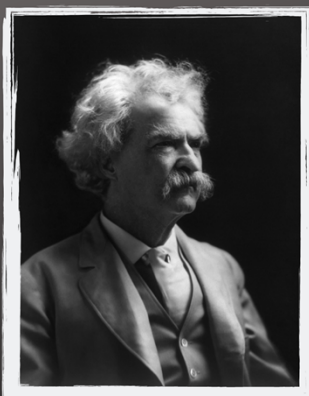
The Ultimate Retirement Solution



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"Don't just sit there and worry. Be proactive. Do something - anything - about what's worrying you so you can gain information, focus and control over the situation. I've suffered a great many catastrophes in my life. Most of them never happened."

Mark Twain



Closing General Sessions

Putting It All Together

2:15 PM – 3:00 PM

Putting It All Together

Stay Informed

1. Read VV Views
2. Watch DCGR & Special Presentations
3. Educational Webcasts

Putting It All Together

Heal Your Current Portfolio

Weed The Garden
Only buy stocks that are right for You
Heed the Color Guard

Putting It All Together

Follow a VectorVest Trading Plan that best matches your investment style

Model Portfolios

Ultimate Retirement Solution

Swing Trading

Putting It All Together

Sign Up with a VectorVest Broker Partner to achieve seamless trading and investing integration.

Mission Statement

Our Mission is to provide the best
stock market guidance available
anywhere at any price.

VectorVest

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Seminars: 1-800-231-0110

Product Support: 1-888-658-7638

E-mail: support@vectorvest.com



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