



STOCK MARKET MASTERCLASS

• TWO-DAY INVESTMENT SEMINAR •



AGENDA & WORKBOOK



SEPTEMBER 11 - 12, 2026
MANDALAY BAY | LAS VEGAS, NV



Mastering the Market
With Precision and Confidence

EVENT SPONSOR: **TradeStation**

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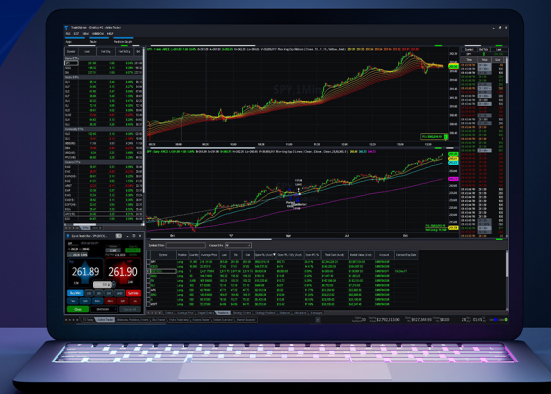
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VectorVest Product Descriptions

VectorVest 7 – VectorVest 7 comes in three formats: Basic, Enhanced and Premium for U.S. and Canadian markets. End-of-Day markets include Australia and Europe. 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 ProTrader v7.0 Searches – ProTrader 7 Searches runs 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 Premium**.

VectorVest Options Launchpad – The power of options, without the complexity. Options Launchpad takes the stock ideas you already trust VectorVest to find and turns them into a clear set of options strategies, no more digging through chains, strikes, expirations or volatility data on your own. You can easily compare structured strategies side by side with cost, risk, reward and an easy-to-read OptionsPlay Score. Try out different 'what if' scenarios to see what your trade could look like before you make it, then take the details straight to your broker. You can add Options Launchpad to your subscription for \$69/month or \$695/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 a broker directly from VectorVest (TradeStation, Questrade, Interactive Brokers). You can add RoboTrader to your subscription for \$99/month or \$1,095/year.

VectorVest RealTime Derby – The VectorVest 7 Derby works with VectorVest Premium to offer a revolutionary, new approach to real-time trading. It runs over one hundred and eighty strategies simultaneously to immediately identify the best performing strategies at any given moment of the day. The Derby 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 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! You can add ProfitLocker Pro to your subscription for \$99/month or \$1,095/year.

Popular VectorVest Courses

The VectorVest Education All Access Pass

You get it all! The All Access Pass includes all of VectorVest's live online courses, on-demand courses and in-person courses for 12 months.

You'll learn everything you need to know about trading a wide variety of investment styles. Learn how to increase profits, especially at market turning points, with precision entrance and exit techniques and gain the confidence you need to profitably trade Stocks, ETFs, and Options for consistent income.

Save Big, over \$17,000 is course content, vs. buying courses individually.
Regular price \$7,500 - **During this event, only \$1,995**

The Successful Investor Course

Six weeks to steady growth includes a complete step-by-step roadmap that shows you how to buy & sell stocks to grow your account safely and consistently by 10%-15% per year. We will take you by the hand and guide you through the EXACT step-by-step Portfolio Profit System...the same system we have taught our clients for over 25 years.

Regular price \$495 – **Included FREE with your VectorVest subscription.**

The Options JumpStarter (*Mastery Edition*)

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 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. With the Mastery edition you will receive 6 Live Support Sessions designed to help you implement the things you learn in the course. We'll review the areas you're struggling in, answer the questions you have and guide you as needed.

If you're new to options or have struggled with them in the past, this is the course for you.
Regular price \$795 - **During this event, only \$395**

Agenda

September 11, 2026

- 9:00 AM Welcome & Course Introduction
- 9:10 AM Avoiding the 7 Deadly Sins of Investing
- 10:00 AM Break
- 10:15 AM The Key to Big Profits: Riding the Wave
- 11:00 AM The Strategic Game Plan:
A Blueprint for Successful Investing
- 12:00 PM Lunch Served
- 1:00 PM Crafting a Secure Retirement:
The Path to Financial Freedom
- 1:45 PM The Near Perfect Indicator:
Identifying Trades that Stack the Odds
- 2:45 PM Break
- 3:00 PM Risk, Reward & Personality:
Finding Your Optimal Investing Path
- 4:00 PM Special Presentation
- 5:00 PM Cocktail Reception

Morning Session

VectorVest

Avoiding the 7 Deadly Sins of Investing

9:10_{AM} – 10:00_{AM}

Avoiding the 7 Deadly Sins of Investing

“There is a big difference between a myth and a sin.
A myth is a false belief based on fantasy or delusion.
There is no intent to mislead or deceive.
A sin, however, is a highly reprehensible act against
religious or moral law.”

-Dr. Bart A. DiLiddo

Avoiding the 7 Deadly Sins of Investing

“Consequently, Deadly Sins have morphed into an
insidious narrative, which is being used against you and
inadvertently may be used by you. Therefore, it is vital to
know what they are and how to defend yourself
against them.”

-Dr. Bart A. DiLiddo

Avoiding the 7 Deadly Sins of Investing

VectorVest has identified and defined the
“7 Deadly Sins of Investing” as follows:

1. **Hypocrisy**...failing to follow one's own rules.
2. **Deceit**...lying so someone believes a falsehood.
3. **Greed**...intense desire to increase one's wealth.
4. **Sloth**...lazy, careless, half-hearted behavior.
5. **Wrath**...uncontrolled feelings of anger, impatience.
6. **Pride**...irrational belief in one's abilities, refuses advice.
7. **Envy**...coveting the success, status or traits of others.

Avoiding the 7 Deadly Sins of Investing

VectorVest has all the tools, information and coaching you need to overcome the “7 Deadly Sins of Investing” and achieve life-changing results in the stock market.

Deadly Sin #1 - Hypocrisy

Wall Street would have you believe that Market Timing is the equivalent of market prediction and therefore impossible.

The irony is that they still make predictions.

VectorVest times the market with a system that has never failed to call a major move up or down!

Let's consult the Market Timing Graph and see it in action.

Deadly Sin #2 - Deceit

Wall Street would have you believe that P/E ratios are the key to understanding a stock's upside potential.

Are earnings rising or falling?

VectorVest knows that earnings direction is the key that ultimately determines true upside potential.

Let's analyze Micron (MU).

Deadly Sin #3 - Greed

Wall Street will attempt to lure you into the promise of a fast, big win on a “sure thing,” if you’re willing to listen.

The “sure thing” seems to change every day.

VectorVest teaches investors how to manage risk by properly sizing their portfolios and using Stop prices to mitigate losses.

VectorVest places a Buy, Sell or Hold rating on every stock, every day.

Deadly Sin #4 - Sloth

Speculators and lazy investors look for an “Easy Button,” where they can buy or sell *based upon guesswork.*

VectorVest does the work for you, i.e., Stock Viewer, Trading System Viewer, UniSearch, etc.

Let’s take a Quick Tour.

Deadly Sin #5 - Wrath

We can recall times when we have felt **anger**, **impatience** or even **disgust** from falling victim to one of the other sins.

VectorVest would have you follow proven systems or methodologies that are designed to keep your emotions in check.

Deadly Sin #6 - Pride

It is easy to get in your own way and submarine an otherwise solid investing plan.

"Pride goeth before the fall."

VectorVest provides all the tools, information and coaching you need to keep you focused on following the best plan for you.

Deadly Sin #7 - Envy

Wall Street is littered with boastful, often jaw-dropping performance claims.

Don't trust anything that anyone says unless it can be verified.

VectorVest believes in buying safe, undervalued stocks rising in price and selling risky, overvalued stocks falling in price.

There is no guesswork and you can verify everything!

Avoiding the 7 Deadly Sins of Investing

It all comes down to having the right information. Let's hear about it from one of our favorite moments with Dr. David Paul.

VectorVest

Break

10:00 AM – 10:15 AM

VectorVest

The Key to Big Profits: Riding the Wave

10:15 AM – 11:00 AM

The Key to Big Profits: Riding the Wave

Market Timing is NOT a Myth — It's a Weapon

Want to Succeed in the Market?
You Must Master This Sequence:

Market Direction → Stock Selection/Trade Setup → Exit Plan

Get Step 1 wrong — and the rest doesn't matter.

The Key to Big Profits: Riding the Wave

Market Trends:

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

-Dr. Bart A. DiLiddo

The Key to Big Profits: Riding the Wave

Let the Market Trend be Your Friend!

- Buy Rising Stocks in Rising Markets.
- Sell Falling Stocks in Falling Markets.

The Key to Big Profits: Riding the Wave

The **VectorVest** Market Timing Graph is your key to success in decoding market trends.
Follow the signal that best fits your investment style.

The Key to Big Profits: Riding the Wave

The VectorVest Proprietary Components for Decoding Market Trends:

- Price of the VectorVest Composite (VVC)
- Buy to Sell Ratio (BSR)
- Relative Timing Indicator (RT)
- Market Timing Indicator (MTI)

The Key to Big Profits: Riding the Wave

Price of the VectorVest Composite (VVC)

- Definition: An arithmetic index of the 10,523 stocks in the database.
- Purpose: Portrays overall market direction.
 - ✓ The Primary Wave is Up when price of the VVC is higher than it was 5 days ago.
 - ✓ The Primary Wave is Dn when price of the VVC is lower than it was 5 days ago.
 - ✓ A preliminary signal of a sustainable trend happens when price of the VVC rises or falls for 2 consecutive weeks.

The Key to Big Profits: Riding the Wave

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. – March 23, 2012)

Green Light Buyer Layout – Aggressive Approach



The Key to Big Profits: Riding the Wave

The Buy to Sell Ratio (BSR)

- Definition: Ratio of Buy to Sell ratings of all the stocks in the database.
- Purpose: Indicates the strength of any major market rally or retreat.
 - ✓ When $BSR > 1.00$ & Rising, it indicates the market rally is healthy and broadening.
 - ✓ When $BSR < 1.00$ & Falling, it indicates the market is not healthy and is continuing to weaken.
 - ✓ When $BSR < 0.20$, the market is searching for a bottom.

The Key to Big Profits: Riding the Wave

Confirmed Calls (U.S. Market)

- An **upturn** is confirmed when the Price of the VVC moves up for two consecutive 5-day periods and the BSR is greater than 1.00.
- A **downturn** is confirmed when the Price of the VVC moves down for two consecutive 5-day periods and the BSR is less than 1.00.

Confirmed Calls Layout – Conservative Approach



The Key to Big Profits: Riding the Wave

The Relative Timing Indicator (RT)

- **Definition:** An indicator of price direction, magnitude and momentum.
- **Purpose:** To display the nature of short-term price performance.
 - ✓ When $RT > 1.00$, the short-term market trend is up.
 - ✓ When $RT < 1.00$, the short-term market trend is down.
 - ✓ Divergences from VVC direction indicate a trend change may be developing.

GLB RT Kicker – Prudent Approach



The Key to Big Profits: Riding the Wave

The Market Timing Indicator (MTI)

- Combines the Price of the VVC, the RT and the BSR into a single indicator.
- Signals the underlying trend of the market:
 - ✓ When $MTI > 1.00$, the underlying trend is up.
 - ✓ When $MTI < 1.00$, the underlying trend is down.
 - ✓ When $MTI > 1.50$, the market is entering a topping phase.
 - ✓ When $MTI < 0.60$, the market is searching for a bottom.
 - ✓ Divergences from VVC direction indicate a trend change may be developing.

MTI – Underlying Trend Chart



The Key to Big Profits: Riding the Wave

ProTrader DEW Timing Model

D = Detrended Price Oscillator
E = Envelopes
W = Weighted Moving Average

ProTrader DEW layout – Prudent Approach



The Key to Big Profits: Riding the Wave

The Color Guard

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.

The Key to Big Profits: Riding the Wave

Three Yellow lights in the Color Guard:

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

The Primary Wave dictates the action!

The Key to Big Profits: Riding the Wave

You can “Ride the Wave” to big profits with
VectorVest!

VectorVest

The Strategic Game Plan: A Blueprint for Successful Investing

11:00 AM – 12:00 PM

The Strategic Game Plan: A Blueprint for Successful Investing



The Strategic Game Plan: A Blueprint for Successful Investing



The Strategic Game Plan:
A Blueprint for Successful Investing

Keep things simple and focus on these

3 Key Elements:

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

The Strategic Game Plan:
A Blueprint for Successful Investing

Build a WatchList

Create a WatchList of stocks you either own
or want to follow so you can start
separating the winners from the losers.

The Strategic Game Plan: A Blueprint for Successful Investing



The Strategic Game Plan: A Blueprint for Successful Investing

Using WatchLists

- 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.
- Weed stocks off the bottom of the list at a comfortable pace.

The Strategic Game Plan:
A Blueprint for Successful Investing

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 our Home Page.

The Strategic Game Plan:
A Blueprint for Successful Investing

Stock Viewer is a gold mine
of valuable information and a great place to start looking
for more winners.

The Strategic Game Plan:
A Blueprint for Successful Investing

Read the Graphs

Favor smooth, steady rising price patterns with smooth,
steady rising earnings.

The Strategic Game Plan:
A Blueprint for Successful Investing

Attend the Successful Investor Group Coaching for
expert daily guidance.

The Strategic Game Plan:
A Blueprint for Successful Investing

This is all the information you need to know to become a
Successful Investor using **VectorVest!**

VectorVest

Lunch Served

12:00 PM – 1:00 PM

Afternoon Session

VectorVest

Crafting a Secure Retirement: The Path to Financial Freedom

1:00 PM – 1:45 PM

Crafting a Secure Retirement

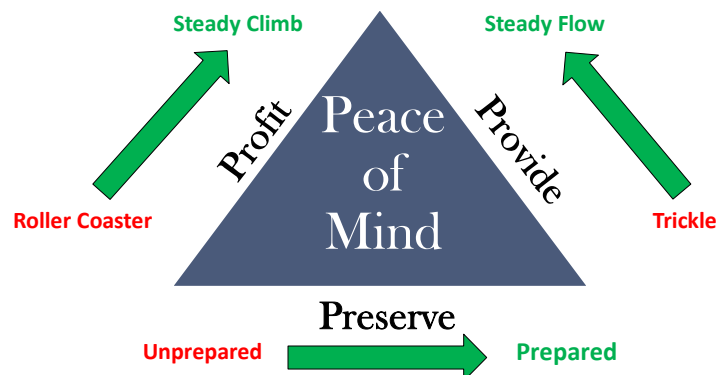
“The interesting thing about investing is that it’s not like the Olympics.

You don’t get any extra points for the fact that something is very hard to do.

So, you might as well just step over one-foot bars, instead of trying to jump over seven-foot bars”

-Warren Buffett

Crafting a Secure Retirement



Crafting a Secure Retirement



Crafting a Secure Retirement

Stock Selection with UniSearch

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 categorized as: Prudent, Conservative, Aggressive or Speculative.
- Searches can be sorted by Groups or Alphabetically.

Crafting a Secure Retirement

Relative Safety

An Indicator of Risk

Consistency and Predictability of Financial Performance are the primary factors in assessing Relative Safety.

Crafting a Secure Retirement

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

Stocks, Strategies and Common Sense

-Dr. Bart A. DiLiddo

Crafting a Secure Retirement

Quality Retirement Searches

- Ruler Stocks (Searches - Prudent)
- Premier Growth Stocks (Searches - Retirement)
- Blue Chip Dividend Payers (Searches - Retirement)
- Pale Blue Chips (Searches - Conservative)

Crafting a Secure Retirement

Profit

Capital Appreciation comes from owning companies with
Consistent and Predictable Financial Performance.

Crafting a Secure Retirement

The screenshot displays the VectorVest 7 - RealTime interface. The left sidebar shows a list of searches under the 'Prudent' category, with 'Ruler Stocks' selected. The main window shows the 'Ruler Stocks' search results. A table lists parameters and their values:

Date/Time	Parameter	Operator	Value
Time of Search	Stock GRT - (Growth Rate)	>=	14
Time of Search	Stock RS - (Relative Safety)	>=	1.4
Time of Search	Stock Price - (Actual)	>=	1
Time of Search	Stock AvgVol - (50 day moving A...	>=	100000
Time of Search	Stock Industry Group	<=	ETFs (Short)
Time of Search	Stock Exchange	<=	L, XL, P, Q, X
Time of Search	Stock Watchlist	<=	ContraContra ETFs

Comments: Finds stocks with well above average safety (RS) and a growth rate above 14%. The stocks are sorted by RS multiplied by Growth Rate which brings the stocks with the best combination of safety and growth to the top of the list.

Market Closed

Crafting a Secure Retirement

The screenshot displays the VectorVest 7 - RealTime interface. The left sidebar shows a list of searches under the 'Retirement' category, with 'Premier Growth Stocks' selected. The main window shows the 'Premier Growth Stocks' search results. A table lists parameters and their values:

Date/Time	Parameter	Operator	Value
Time of Search	Stock GRT - (Growth Rate)	>=	14
Time of Search	Stock MktCap - (Market Capital...	>=	15000.00
Time of Search	Stock Price - (Actual)	>=	1.00
Time of Search	Stock AvgVol - (50 day moving A...	>=	100000
Time of Search	Stock Industry Group	<=	ETFs (Short)
Time of Search	Stock Exchange	<=	L, XL, P, Q, X
Time of Search	Stock Watchlist	<=	ContraContra ETFs

Comments: This strategy finds safe, predictable, high market capitalization stocks that are moving up in price.

Market Closed

Crafting a Secure Retirement

Provide

Steady Income from Dividends
and Covered Calls

Part One

Crafting a Secure Retirement

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.

*$DY = 100 * (\text{Annual Dividends Per Share} / \text{Price Per Share})$.*

Crafting a Secure Retirement

VectorVest Dividend Indicators

- DS = Dividend Safety
- DG = Dividend Growth
- YSG = Yield, Safety & Growth Vector

Crafting a Secure Retirement

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 including solid cash flow.

Crafting a Secure Retirement

DG (Dividend Growth):

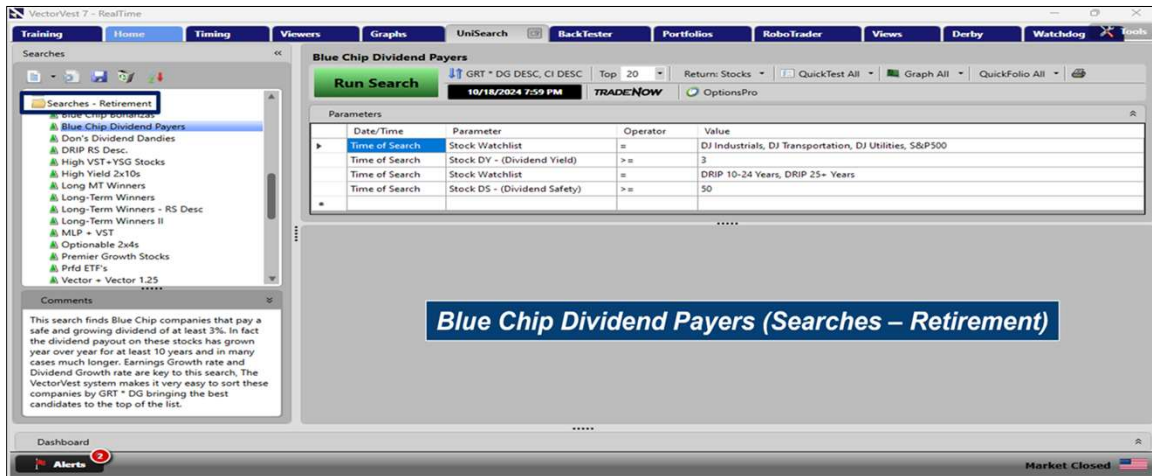
- A forecasted annual growth rate of a company's dividend, based on historical dividend payments and dividend predictability.
- It is a subtle yet important indicator of a company's financial performance.
- It also provides some insight into the board's outlook and the company's ability to increase earnings.

Crafting a Secure Retirement

YSG (Yield, Safety, Growth):

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

Crafting a Secure Retirement



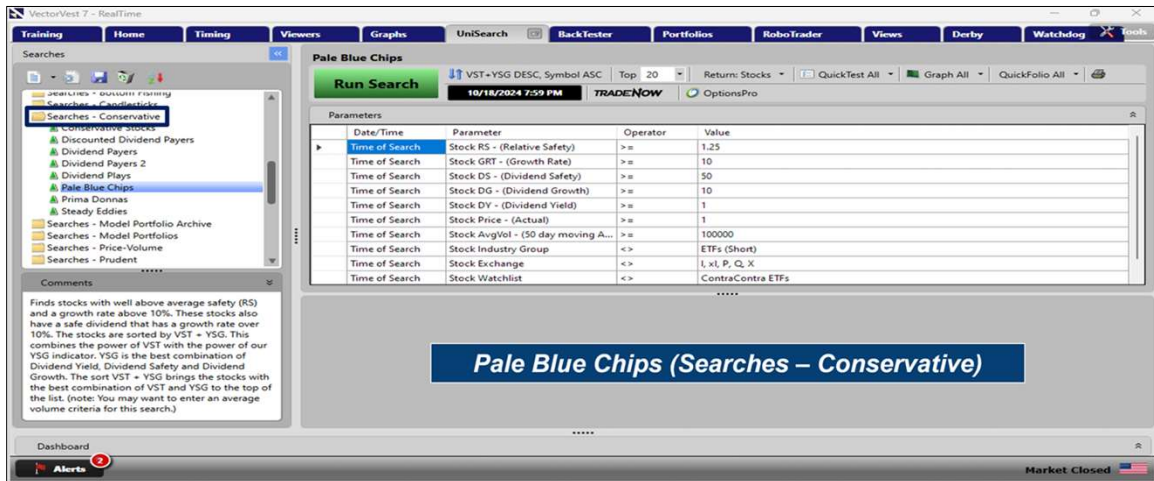
Crafting a Secure Retirement

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

Stocks, Strategies and Common Sense

-Dr. Bart A. DiLiddo

Crafting a Secure Retirement



Crafting a Secure Retirement

Provide

Steady Income from Dividends
and Covered Calls

Part Two

Crafting a Secure Retirement

Dividend Income

Portfolio	2025	2026 YTD
Blue Chip Dividend Payers	\$2,458.07	\$1,459.27
Ruler Stocks	\$161.53	\$306.07
Prima Donnas	\$1,018.97	N/A
Pale Blue Chips	N/A	\$1,167.61
YTD TOTALS:	\$3,638.57	\$2,932.95

*As of July 31, 2026

Crafting a Secure Retirement

Covered Calls

“If you own shares of stock (minimum 100 shares) and you’re not selling call options against them, then you are throwing money away...”

There are traders who will give you money today for the right to take your stock from you if it reaches a much higher price...

Selling “covered calls” is such a great strategy for padding your account that I still can’t believe some investors aren’t taking advantage of it!”

-Lee Lowell – Get Rich with Options

Crafting a Secure Retirement

Buy-Write Guidelines

- Receive a 5% Return on Investment if Called Away.
- Premium received is at least 2% of Stock Price.
- Expiration is between 30 and 45 days.
- Open Interest is at least 100 Contracts.
- Never hold through an Earnings Report.

Crafting a Secure Retirement

2026 Buy-Write Portfolio

10% return with 72% Winning Trades

*As of July 31, 2026

Crafting a Secure Retirement

Preserve

Risk Management Using Protective Puts

Crafting a Secure Retirement



**"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

Crafting a Secure Retirement

Protective Puts Reduce Risk

Buy Put Options to protect individual stock positions or your entire portfolio.

Crafting a Secure Retirement

You can retire with peace of mind knowing that you can steadily grow your portfolio, generate income and preserve your capital using VectorVest!

VectorVest

The Near Perfect Indicator: Identifying Trades that Stack the Odds

1:45 PM – 2:45 PM

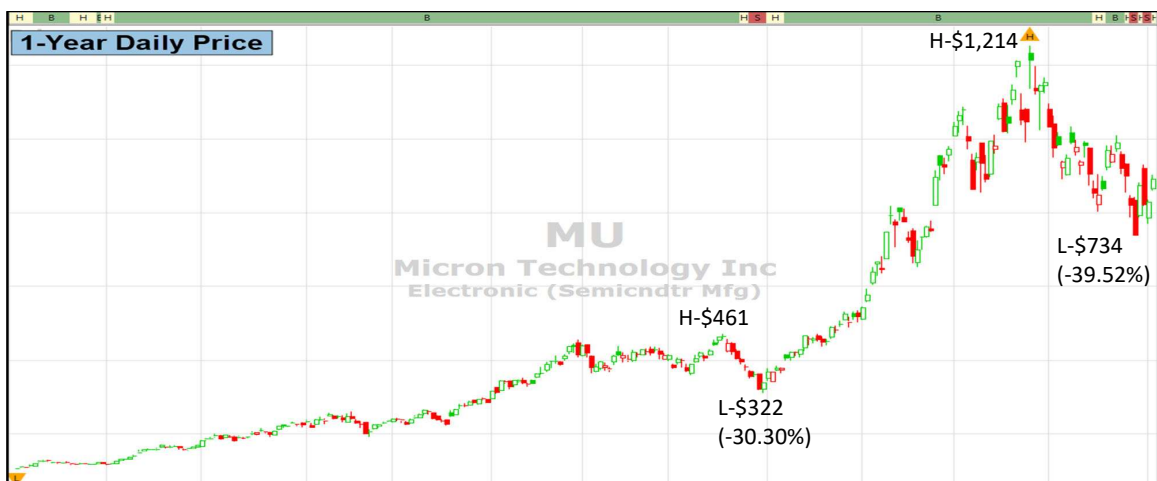
The Near Perfect Indicator: The Trader's Edge

Two Timing Mistakes That Cost Traders the Most

1. Buying a strong stock too late – then getting stopped out.
2. Selling a winner too early – then watching it climb another 50%.

Both are usually cycle mistakes – not stock-selection mistakes.

A Great Stock Can Still Be a Poor Trade – If the Timing is Wrong



The NPI Reveals Where You Are in the Trade Cycle



The NPI: The Pattern for Better Cycle Timing

What if better cycle timing helped you avoid these poor entries – and stay with a few major winners longer?

That is the job of the NPI.

RT Spots Momentum Before Price Accelerates

- **RT measures momentum.** It acts as a radar for stock price movement.
- **Why momentum matters:** It always moves first and strongest. As described by VectorVest Founder Dr. Bart DiLiddo, RT detects **direction, velocity, and momentum** not visible to the naked eye.
- **How the NPI displays RT:** Smoothed with 5- and 40-period Simple Moving Averages to provide clarity and reduce noise.
- **How Traders Benefit:** The NPI RT identifies **high momentum opportunities** often near the bottom of price cycles. The result is earlier entries, defined risk, and far less guesswork.

STOP Confirms When Momentum Becomes a Trend

The STOP Price confirms the Trend:

The goal isn't just finding good entries. The goal is to stay in good trades.

- **Defines** true price direction.
- **Displays** fundamental + technical strength.
- **Smoothed for clarity:** Uses 5- and 40-period Moving Averages of the STOP Price.
- **Helps avoid premature exits:** When the trend is confirmed, the STOP Price trend helps us stay with high-potential runners – and that's where meaningful profits come from.

Rule #1: Momentum First. Trend Second.

Rule #1

Momentum First. Trend Second.

- NPI RT acts as a radar for price movement
- Identifies the opportunity early – that's Momentum.
- NPI STOP *confirms the move is becoming sustainable* – that's Trend.

Rule #2: Enter Before the Opportunity Looks Obvious

Rule #2

The Best Trades Begin Before They Look Obvious

- Most traders buy late in the price cycle after excitement appears.
- NPI helps identify the opportunity earlier in the cycle.

Let's look at a few more examples.

A Repeatable Process Leads to Success



Momentum + Trend + Risk Management

**RT Momentum + Sustained STOP Trend +
Risk Management = Success**

This is a *rules-based, repeatable, systematic approach* to capturing early momentum and sustained directional moves using Moving Averages of VectorVest's advanced technical indicators – RT and STOP.

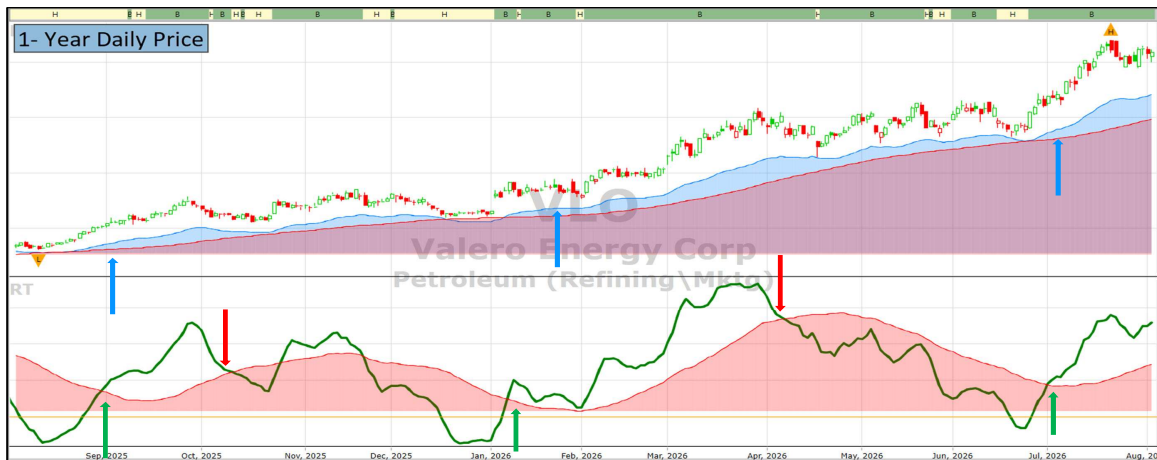
Early Momentum Creates the First Opportunity



Strong Industry Groups Improve the Odds



Cycle Strength Helps Narrow the Field



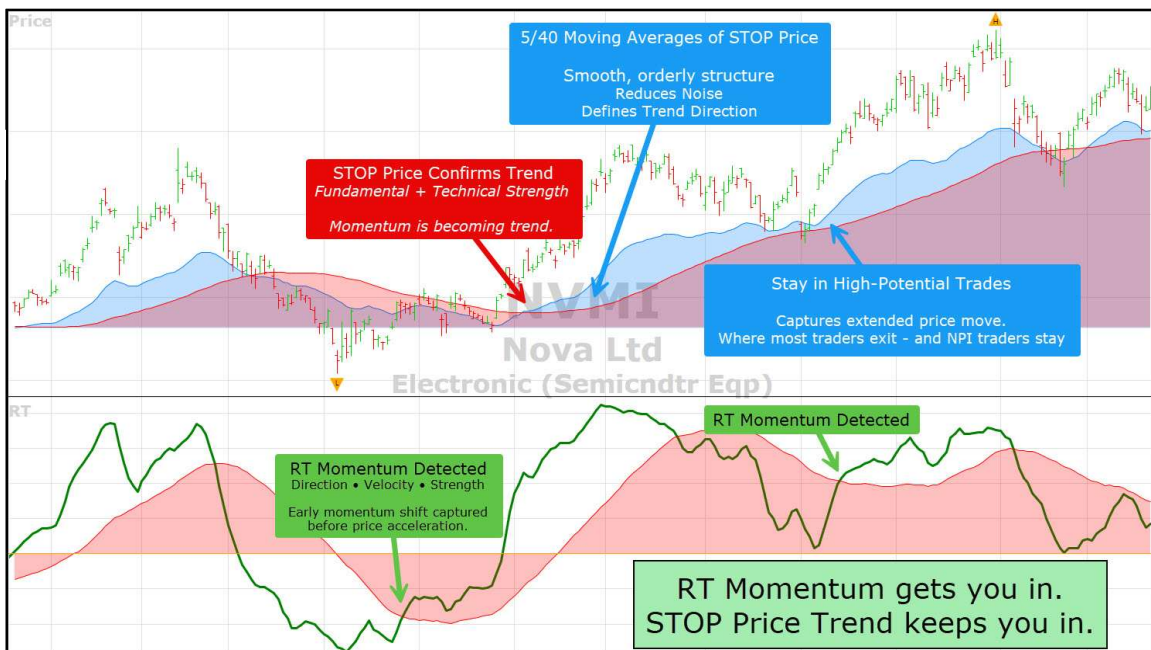
Strong Winners Need Room to Run



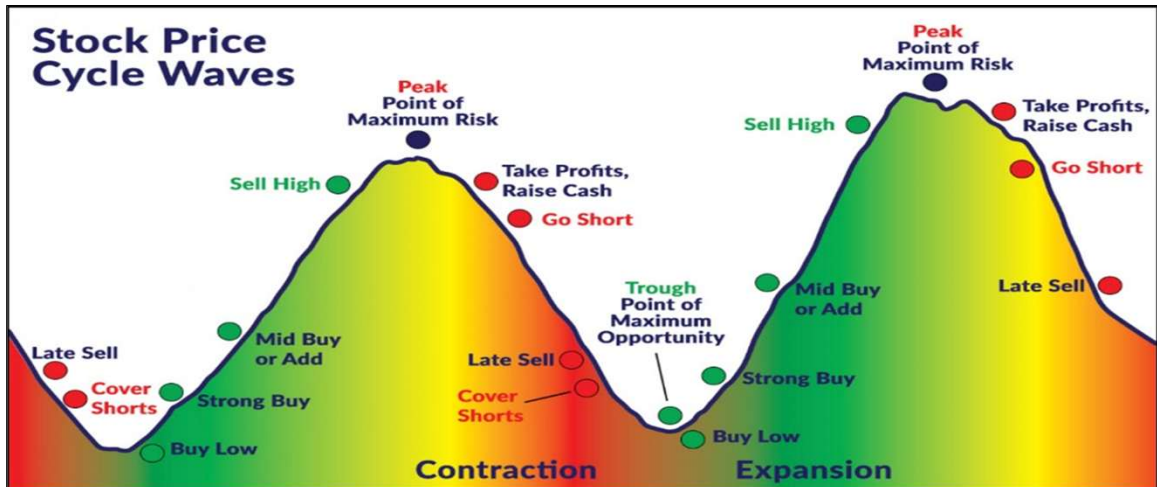
Price Alone is Not Enough

Price Alone is Not Enough

- Price hides cycle position.
- RT acts as a radar for price movement.
- Momentum reveals opportunity early.



Price Cycles Repeat – Learn Where You Are



The RT 40-MA Reveals the Price Cycle Waves



Hundreds of stocks display similar Price Cycle Wave patterns every single day.

Rule #3: Sustained Trends Reward Patience

Rule #3

Sustained Trends Reward Traders Who Stay Patient

- Big winners come from staying with confirmed trends instead of overtrading.
- NPI STOP helps confirm the long-term trend.

A Subscriber's Idea Extended the NPI

From: Francis N.

I was going through your wonderful explanation of NPI graphs with all their advantages, when it dawned on me that instead of acting on the cross overs of MA (RT) (5) and MA (RT) (40), **just staying with the stock, when the blue range of MA Stop (5) is in line with or above the red range of MA Stop (40), should be sufficient.**

With STRL (US side) for example, I could have stayed with this stock from 18Oct2022 until now and not make any changes, giving me a profit of over 227% profit in just over 9 months.

The credit for introducing NPI will always be yours. I also use the Guppy graphs which are an excellent visual understanding. As a Master Mariner all my life, I understand navigation charts with terrestrial and celestial navigation. This is no different and the NPI brings a definite order and sound understanding.

I look forward to your continued lessons with the NPI.

Francis N's Idea – Stay With the STOP Trend



The Long-term Hold Strategy in Action



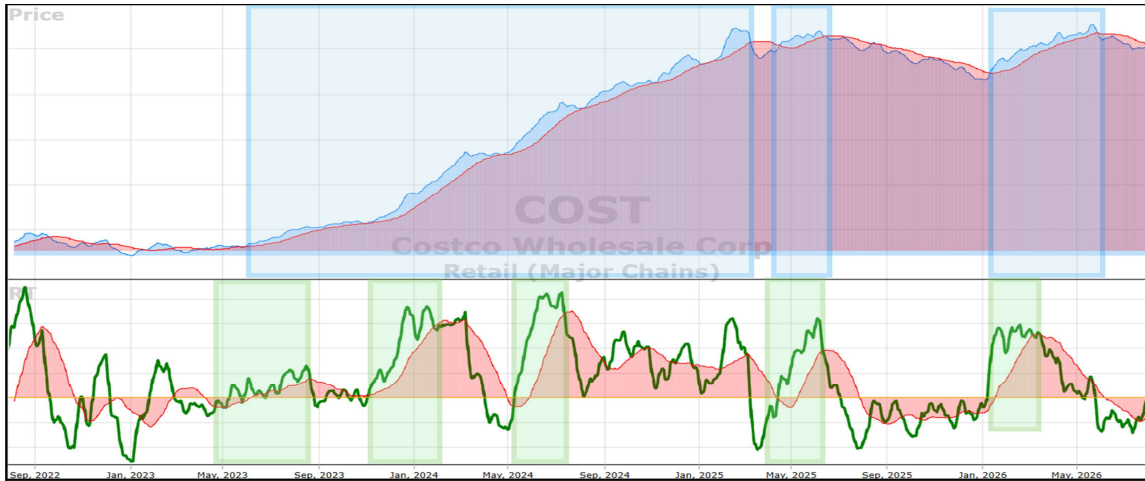
Nvidia: RT Gets You In – STOP Keeps You In



Apple: Staying With the Trend Captured the Move



Costco – Trend Confirmation Rewarded Patience



Avoid Buying High in the Price Cycle

Buying Too High in the Price Cycle

- Most traders buy after the price has already moved sharply higher.
- The higher the price goes, the more confident traders feel—yet the risk of a pullback is increasing.
- Late entries limit upside, increase downside and set traders up for frustration.

The Best Decision is Sometimes 'No'



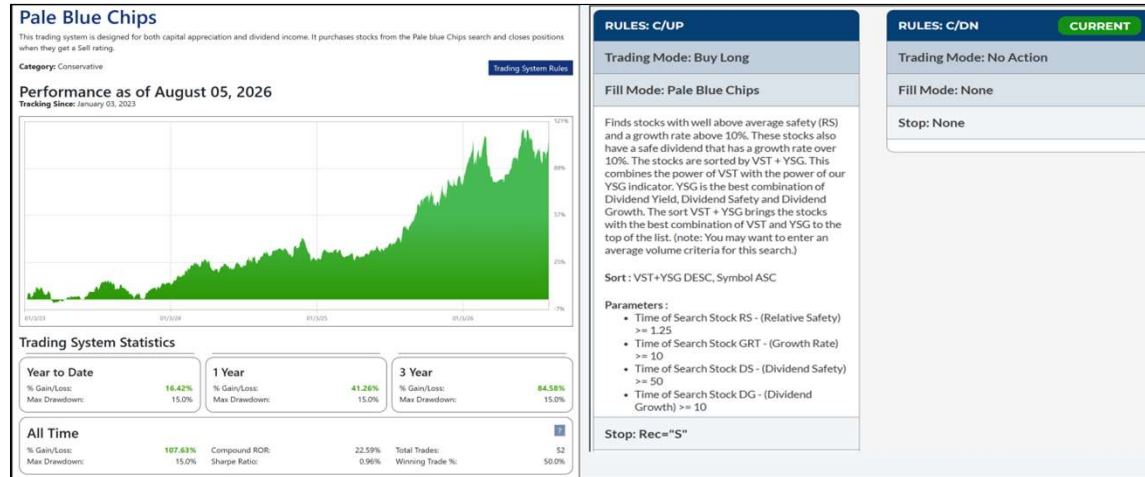
Reject High-Risk Entries Before They Happen

Why It Matters

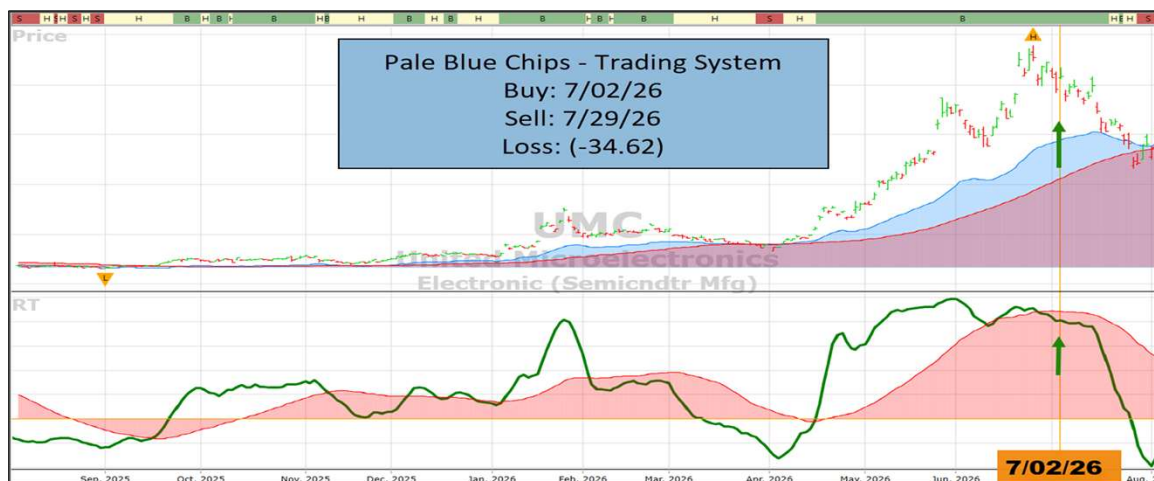
- NPI reveals true price action and cycle position.
- Highlights **early vs late** opportunities.
- Keeps traders focused on low-risk entries.

The following two Pale Blue Chips *case studies* show the difference.

Pale Blue Chips – Test Before You Trade



The NPI Would Have Said: Don't Buy Here



Buying Near a Cycle Low Changes the Outcome



Trend Management Meets Money Management

Masterfully manage risk according to NPI cycles by legging into positions in up cycles and legging out of positions in down cycles.

Leg In and Out With Rules – Not Emotion

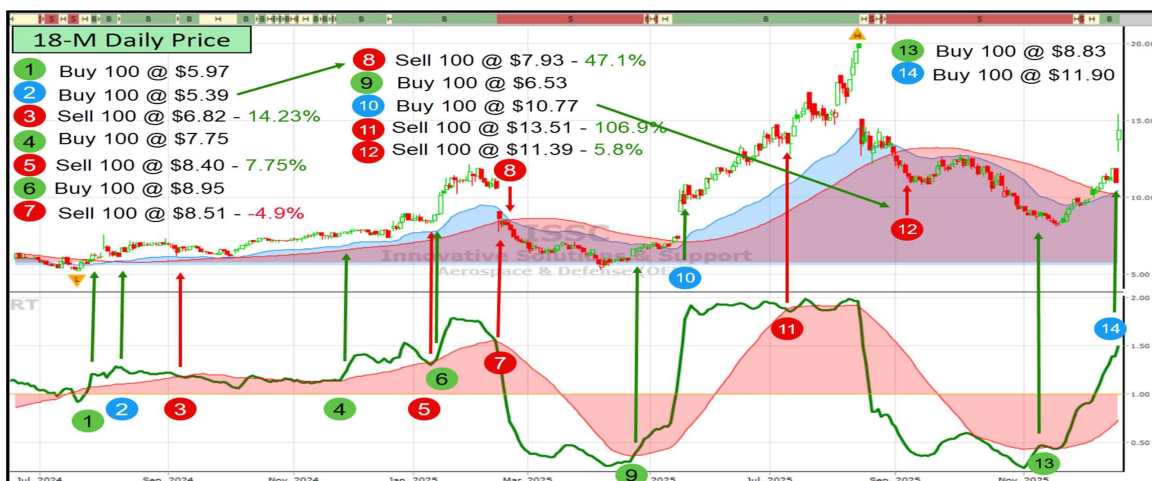
Market Timing Approach

- Enter and exit your full or partial shares in stages based on market timing indicators and the NPI.

Equal Increment Strategy (today's strategy)

- Divide your total investment capital into two, three or more equal portions.
- Buy one-half or one-third of a full position when the 5-MA of RT crosses **above** the 40-MA of RT.
- Add shares when the 5-MA of STOP Price crosses **above** the 40-MA of STOP Price.
- Sell your initial partial shares when the 5-MA of RT crosses **below** the 40-MA of RT.
- Sell all remaining shares when the 5-MA of STOP Price crosses **below** the 40-MA of STOP Price.

Legging In - Keeping It Simple



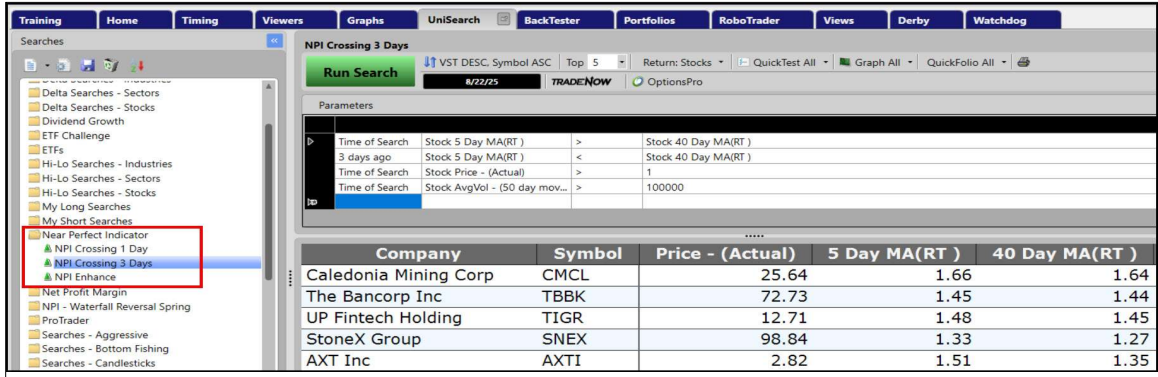
Legging Out – Reduce Risk as Trend Weakens



Finding NPI Candidates: Live Charts

1. Stock Viewer—high VST, RS, CI and GRT ratings
2. VectorVest WatchLists or your own custom WatchLists
3. Searches from the Near Perfect Indicator Folder (ProTrader add-on required)
4. Top Searches from Derby Winners (Views or Derby add-on)
5. Trading Systems Viewer—study graphs of new holdings

Find New NPI Crossovers with ProTrader



NPI Crossing 3 Days

Run Search

Parameters

Company	Symbol	Price - (Actual)	5 Day MA(RT)	40 Day MA(RT)
Caledonia Mining Corp	CMCL	25.64	1.66	1.64
The Bancorp Inc	TBBK	72.73	1.45	1.44
UP Fintech Holding	TIGR	12.71	1.48	1.45
StoneX Group	SNEX	98.84	1.33	1.27
AXT Inc	AXTI	2.82	1.51	1.35

*Search Requires ProTrader Add-in for Technical Studies
 **Filter using your favorite WatchLists

VectorVest Resources for Continued Learning

Essay – VectorVest US

August 5, 2022 – A Game Changer. The NPI – an Employee and Subscriber favorite.

Essay – VectorVest Canada

June 16, 2023 – NPI Trading Secrets. Understanding Stock Price Peaks and Troughs.

June 2, 2023 – Be Prepared. NPI Searches with a WatchList filter.

June 30, 2022 – NPI Manual Backtest Proves Its Worth.

February 18, 2022 – The Near Perfect Indicator. An introduction to the NPI.

Video Presentations – VectorVest University.

July 6, 2023 – Near Perfect Entries & Exits by Glenn Tompkins

August 5, 2022 – A Game Changer by Stan Heller

Video Presentations – VectorVest YouTube

September 7, 2024 – Legging In and Out With the Near Perfect Indicator by Stan Heller

VectorVest

Break

2:45 PM – 3:00 PM

VectorVest

Risk, Reward & Personality: Finding Your Optimal Investing Path

3:00 PM – 4:00 PM

Risk, Reward & Personality

“Every investor needs to define a realistic set of goals, the amount of risk they can handle and a feasible investment plan. In my case I wanted to double my money every 5 years, I was willing to accept modest losses, and I was going to invest in quality growth stocks.”

-Dr. Bart A. DiLiddo

Risk, Reward & Personality



Risk, Reward & Personality

“Prudent Investors want the best of all worlds; high reward and low risk. They are interested in outperforming the market over the long-term and achieving annual returns greater than the sum of inflation and interest rates.”

-Dr. Bart A. DiLiddo

Risk, Reward & Personality

Top Prudent Approach in VectorVest Right Now

Ruler Stocks – PL Prudent

Jan. 3, 2017 to July 23, 2026

Total Gain = 427.65%

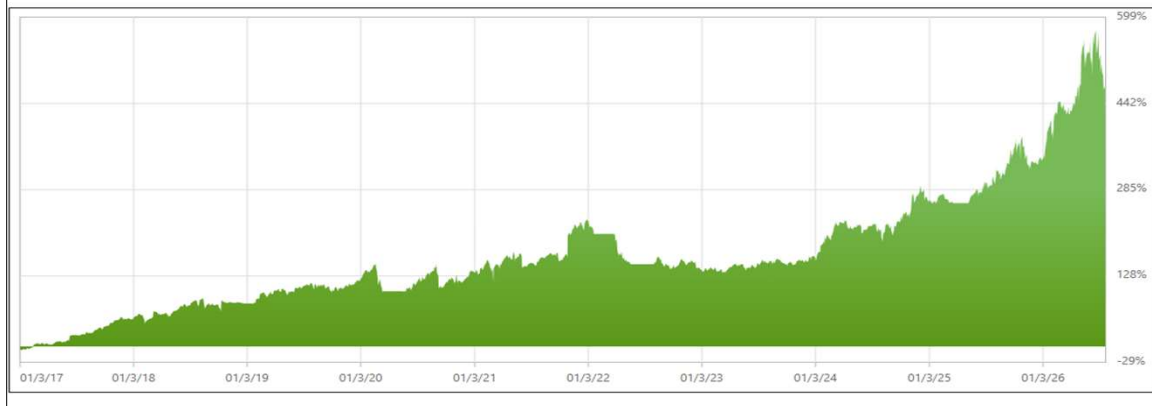
CROR = 20.05%



Ruler Stocks – PL Prudent

Performance as of July 23, 2026

Tracking Since: January 03, 2017



Risk, Reward & Personality

“Aggressive Investors want high performance, e.g. capital appreciation greater than 20 percent per year and are willing to take substantial risk to achieve it.”

-Dr. Bart A. DiLiddo

Risk, Reward & Personality

Top Aggressive Approach in VectorVest Right Now

Hot Stock Portfolio - 50% Gain or 20% Loss

Jan. 22, 2024 to July 23, 2026

Total Gain = 315.80%

CROR = 76.84%



Hot Stock Portfolio – 50% Gain or 20% Loss

Performance as of July 23, 2026

Tracking Since: January 22, 2024



Risk, Reward & Personality

“Conservative Investors buy stocks but do not like to take much risk, they are primarily interested in capital preservation and are delighted to settle for average market returns.”

-Dr. Bart A. DiLiddo

Risk, Reward & Personality

Top Conservative Approach in VectorVest Right Now

Pale Blue Chips

Jan. 3, 2023 to July 23, 2026

Total Gain = 100.05%

CROR = 21.56%



Pale Blue Chips

Performance as of July 23, 2026

Tracking Since: January 03, 2023



Risk, Reward & Personality

Bottom-Fishing for Explosive Profits!
Is it a good solution for you?

Risk, Reward & Personality

“Speculative Investors are looking for big gains without regard for risk.”

-Dr. Bart A. DiLiddo

Risk, Reward & Personality

Precision Bottom-Fishing

Requires a paradigm shift in stock selection. Favor low-RT
Bottom-Fishing searches for explosive profit potential.
These stocks will often be rated a “Sell” in VectorVest.

Risk, Reward & Personality

Timing is everything when Bottom-Fishing!

Risk, Reward & Personality

Bottom-Fishing Approach

Silber's Singles/BMB

April 10, 2025 to Aug. 11, 2025

Total Gain = 67.47%



Silber's Singles/BMB

QuickTest - Silber's Singles/BMB

4/10/2025 - 8/11/2025 Stream Run Test Reset Sort

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

Symbol	Begin Price	End Price	% Price C	Total ARR
WULF	2.24	5.40	141.07%	418.91%
FLNC	3.86	9.14	136.79%	406.19%
RAIL	4.71	9.08	92.78%	275.52%
EBS	4.26	8.16	91.55%	271.86%
HIMS	26.81	49.98	86.42%	256.63%
SMTC	27.00	48.56	79.85%	237.12%
BTDR	7.60	12.79	68.29%	202.79%
JVA	3.15	4.21	33.65%	99.93%
SDA	2.63	2.20	-16.35%	-48.55%
FNKO	4.60	2.79	-39.35%	-116.84%

Average: \$8.686 \$15.231 67.47% 200.36%

Compare To: SPX

Symbol	Begin Price	End Price	% Price Cha	Total ARR
SPX	5268.05	6373.45	20.98%	62.31%

Risk, Reward & Personality

Prudent, Aggressive, Conservative, Speculative?

Which one of these investment styles
rings **your** bell?

VectorVest

Special Presentation

4:00 PM

VectorVest

Cocktail Reception

5:00 PM

VectorVest

Stock Market Master Class

End of Day One

VectorVest

Stock Market Master Class

Start of Day Two

Agenda

September 12, 2026

9:00 AM ETF Master Class:

Understanding Traditional, Leveraged and Inverse Funds

9:45 AM Break

10:00 AM Supercharge Your ETF Performance

11:00 AM Options for Stock Traders

12:00 PM Lunch Served

1:00 PM Elevating Your Swing Trading:

Techniques for Precision and Profit

1:45 PM Break

2:00 PM Coaches Panel Discussion

3:00 PM Taking Control:

Turning Your Plan into Action

3:15 PM Adjourn

3:30 PM Coaches Group Meet-up

(Coaching Group Members Only)

Morning Session

VectorVest

ETF Master Class:

Understanding Traditional,
Leveraged and Inverse Funds

9:00 AM – 9:45 AM

ETF Master Class

“No invention has been more disruptive to the asset management industry in the last quarter-century than the Exchange-Traded Fund.”

-Crystal Kim, Barron's

ETF Master Class

An Exchange-Traded Fund (ETF) is an investment fund that holds multiple underlying assets and can be bought and sold on an exchange, much like an individual stock. ETFs can be structured to track anything from the price of a commodity to a large and diverse collection of stocks.

ETF Master Class

Why Are ETFs Exploding in Popularity?

ETFs, Exchange-Traded Funds, eliminate single stock risk like Mutual Funds do, but can be traded like stocks on an exchange.

Why Are ETFs Exploding in Popularity?

ETFs provide an amazing range of investment flexibility and convenience...

from matching the performance of indexes, to international investing, to commodity and currency trading and to selling short without margin.

Why Are ETFs Exploding in Popularity?

Active Management

Active ETFs aim to outperform their benchmarks, offering investors the potential for higher returns through skilled management.

Why Are ETFs Exploding in Popularity?

Tax Efficiency

ETFs often have lower tax implications compared to mutual funds, making them more attractive for investors.

Why Are ETFs Exploding in Popularity?

Lower Costs

Many have minimal fees, providing a financial advantage for investors.

Why Are ETFs Exploding in Popularity?

Market Flexibility

ETFs allow for easy trading and access to various investment opportunities, making them a versatile choice for investors. There are also bear/inverse funds that help take the guesswork out of shorting stocks.

Why Are ETFs Exploding in Popularity?

Increasing Interest

Inflows are surging, leading to a growing acceptance of the evolving stock market landscape.

Most Popular Passive ETFs

- S&P 500 (SPY)
- Dow Jones Industrial Average (DIA)
- Nasdaq-100 (QQQ)
- iShares MSCI EAFE (EFA)

- iShares MSCI Emerging Markets ETF (EEM)
- iShares Core U.S. Aggregate Bond (AGG)
- Russell 2000 Small Cap (IWM)

Active ETF Examples

- JPMorgan Equity Premium Income (JEPI)
- JPMorgan Global Select Equity (JGLO)
- Dimensional US Small Cap (DFAS)
- T. Rowe Price Blue Chip Growth (TCHP)
- ARK Innovation (ARKK)
- AdvisorShares Pure U.S. Cannabis (MSOS)
- Pimco Active Bond (BOND)
- T. Rowe Price Capital Appreciation Equity (TCAF)

ETF Master Class

A leveraged ETF is an Exchange-Traded Fund that uses debt or financial derivatives as leverage to amplify the returns of a benchmark index, such as the S&P 500.

Important Leveraged ETF Characteristics

- High fees
- Intended for shorter trade durations
- Compounding greatly impacts returns
- Magnified returns in up and down markets
- Highly volatile
- Popular among active traders

Popular 2x ETF Pairs

Up Markets

- SSO
- QLD
- DDM
- UWM

Down Markets

- SDS
- QID
- DXD
- TWM

Popular 3x ETF Pairs

Up Markets

- TQQQ
- SOXL
- TNA
- UDOW
- UPRO
- FAS

Down Markets

- SQQQ
- SOXS
- TZA
- SDOW
- SPXU
- FAZ

Common Investor ETF Mistakes

- Buying the wrong funds based on confusion of company name or ticker.
- Failing to research ETF components and risks.
- Selecting concentrated instead of diversified funds.
- Buying highly volatile funds.
- Not using stops or defensive tactics.

Making Money with ETFs

Bullish ETFs

Consider using the bullish ETF search in up markets.

ETF Pairs – Bullish on April 8, 2026 (DEW Up Call)

QuickTest - ETF Pairs - Bullish				
4/8/2026 - 7/13/2026 Stream Run Test Reset Sort				
Record Count - 10 (6 Winners, 4 Losers, 0 Even)				
Symbol	Begin Price	End Price	% Price C	Total ARR
SOXL	67.50	165.37	144.99%	551.65%
LABU	177.29	272.84	53.89%	205.05%
HIBL	69.43	106.84	53.88%	205.00%
TNA	50.88	69.71	37.01%	140.81%
EDC	66.64	73.39	10.13%	38.54%
EFO	70.59	71.878	1.82%	6.94%
UCO	39.83	38.74	-2.74%	-10.41%
ERX	92.11	86.65	-5.93%	-22.55%
GUSH	39.21	35.08	-10.53%	-40.07%
OILU	46.61	39.23	-15.83%	-60.24%
Average: \$72.009 \$95.9728 26.67% 101.47%				
Compare To: SPX				
Symbol	Begin Price	End Price	% Price Cha	Total ARR
SPX	6782.81	7515.34	10.80%	41.09%

Making Money with ETFs

Bearish ETFs

Consider using a bearish ETF search in
down markets.

ETF Pairs – Bearish on March 3, 2026 (DEW Dn Call)

QuickTest - ETF Pairs - Bearish				
3/3/2026 - 3/31/2026 Stream Run Test Reset Sort				
Record Count - 10 (6 Winners, 4 Losers, 0 Even)				
Symbol	Begin Price	End Price	% Price C	Total ARR
FNGD	64.76	73.90	14.11%	184.11%
FLYD	73.499	81.465	10.84%	141.38%
FAZ	46.51	50.74	9.09%	118.64%
SCC	15.72	17.08	8.65%	112.85%
WEBS	26.98	29.22	8.30%	108.30%
TSLZ	14.72	15.88	7.88%	102.80%
FXP	20.436	20.36	-0.37%	-4.85%
YANG	29.34	29.14	-0.68%	-8.89%
SBIT	58.62	56.97	-2.81%	-36.72%
BTCZ	5.66	5.47	-3.36%	-43.79%
Average: \$35.6245 \$38.0225 5.17% 67.38%				
Compare To: SPX				
Symbol	Begin Price	End Price	% Price Cha	Total ARR
SPX	6816.63	6528.52	-4.23%	-55.13%

ETF Master Class

“You’ve seen the process. Now you can apply the discipline behind smarter ETF investing.”

VectorVest

Break

9:45 AM – 10:00 AM

VectorVest

Supercharge Your ETF Performance

10:00 AM – 11:00 AM

Supercharge Your ETF Performance

What is the QQQ ETF?

The **QQQ ETF** (officially known as the **Invesco QQQ Trust**) is one of the most popular and widely traded ETFs. It aims to track the **Nasdaq-100 Index**, which consists of the 100 largest non-financial companies listed on the Nasdaq stock exchange. These companies are typically leaders in technology, communication services, consumer discretionary, and healthcare sectors, making QQQ heavily focused on tech and growth-oriented companies.

Supercharge Your ETF Performance

Why Do Investors Favor the QQQ?

Overall, the QQQ ETF is a popular choice for investors who want exposure to tech-focused growth companies and believe in the long-term strength of technology and innovation in the market.

Supercharge Your ETF Performance

Nasdaq-100 Performance

QQQ ETF Trading System

February 14, 2020 to July 23, 2026

Total Gain = 121.09%

CROR = 13.12%

Supercharge Your ETF Performance

How to Trade the QQQ ETF Trading System

It's as easy as 1-2-3

1. Buy the QQQ ETF on the First GLB RT Kicker Up Signal after a C/Dn.
2. Manage the QQQ position with a 99% gain or 15% loss from the purchase price.
3. Sell the QQQ ETF on a C/Dn the following day at the open.

QQQ ETF Trading System Performance as of July 23, 2026

Performance as of July 23, 2026

Tracking Since: February 14, 2020



Supercharge Your ETF Performance

Is there a relatively easy way to double that kind of performance?

Supercharge Your ETF Performance

Double Leverage on the Nasdaq-100

Reitsma and Ellis NETS - TURBO

December 29, 2015 to July 23, 2026

Total Gain = 1,539.92%

CROR = 33.31%

Supercharge Your ETF Performance

QQQ ENTRY

VVC is in a Confirmed Down (C/Dn)
One day ago, the 10 Day MA RT $\leq$ 15 Day MA RT at the close
At the current day's close the 10 Day MA RT $>$ 15 Day MA RT
At the current day's close RT ≤ 1.12
Place an order to buy **QQQ** at the next day's open



QQQ EXIT

Confirmed Up (C/Up) signal at the current day's close ▲
Place an order to sell **QQQ** at the next day's open

Supercharge Your ETF Performance

QLD ENTRY

Confirmed Up (C/Up) condition is still in place
RT ≤ 1.4 at the current day's close
Buy QLD at the next day's open
Set 30% gain and 5% loss stop using the next day's open



QLD EXIT

Closing price $\geq 30\%$ gain or $\leq 5\%$ loss or C/Dn signal at the close ▼
Place an order to sell QLD at the next day's open

Reitsma and Ellis NETS – TURBO as of July 23, 2026

Performance as of July 23, 2026

Tracking Since: December 29, 2015



Supercharge Your ETF Performance

Can we ramp up the performance even more?

Supercharge Your ETF Performance

INTRODUCING TURBO 26!

Supercharge Your ETF Performance

QLD ENTRY

Confirmed Up (C/Up) condition is still in place

REMOVED RT <= 1.4 at the current day's close

Buy QLD at the next day's open

Set 30% gain and 5% loss stop using the next day's open



QLD EXIT

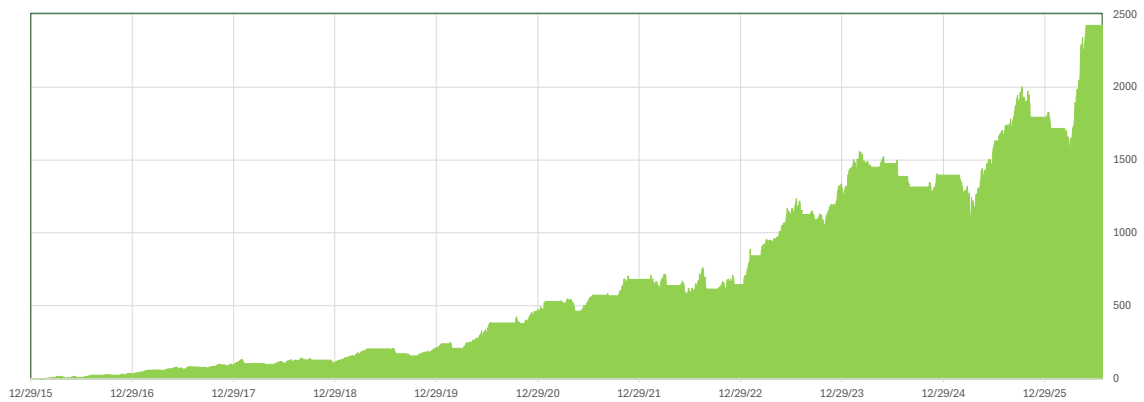
Closing price >= 30% gain or <= 5% loss or C/Dn signal at the close ▼

Place an order to sell QLD at the next day's open

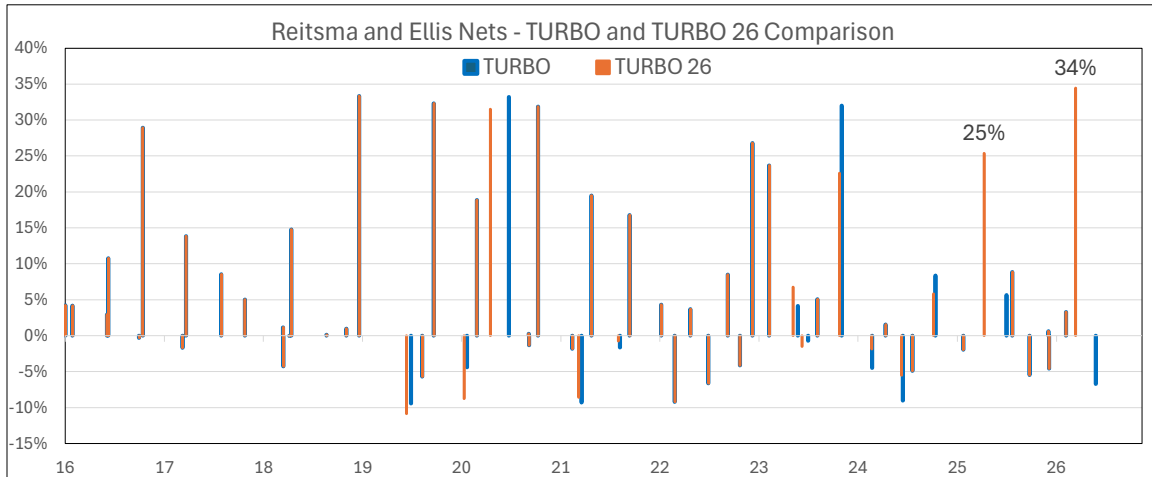
Reitsma and Ellis NETS – TURBO 26 as of July 23, 2026

TURBO 26 Performance as of July 23, 2026

Tracking Since: December 29, 2015



Supercharge Your ETF Performance



Supercharge Your ETF Performance

DECEMBER 29, 2025 - JULY 23, 2026		
STATISTICS	TURBO	TURBO 26
TRADES	56	56
% WINNERS	60.71%	62.50%
% G/L	1492.92%	2428.19%
MAX DRAWDOWN	27.18%	27.68%

935.27% GAIN!

* \$0.01 commission per trade

Supercharge Your ETF Performance

Triple Leverage on the Nasdaq-100

Reitsma's NETS - NITRO

December 29, 2015 to July 23, 2026

Total Gain = 7,248.89%

CROR = 50.19%

Supercharge Your ETF Performance

QQQ ENTRY

VVC is in a Confirmed Down (C/Dn)

One day ago, the 10 Day MA RT $\leq$ 15 Day MA RT at the close

At the current day's close the 10 Day MA RT $>$ 15 Day MA RT

At the current day's close RT ≤ 1.12

Place an order to buy **QQQ** at the next day's open



QQQ EXIT

Confirmed Up (C/Up) signal at the current day's close ▲

Place an order to sell **QQQ** at the next day's open

Supercharge Your ETF Performance

TQQQ ENTRY

1. VVC is in a Confirmed Up (C/Up)
8. $RT \leq 1.4$ at the current day's close
9. Buy **TQQQ** at the next day's open
10. Set 50% gain and 5% loss stop using the next day's open



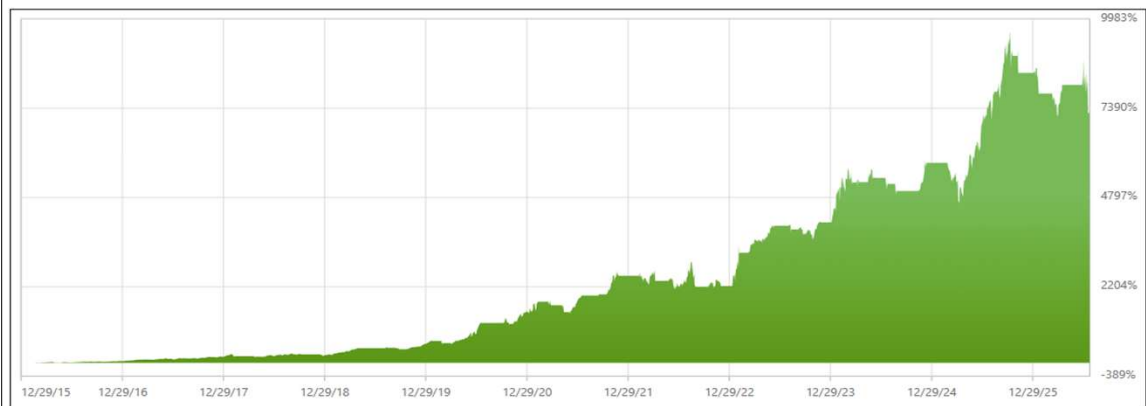
TQQQ EXIT

12. Closing price $\geq 50\%$ gain **or** $\geq 5\%$ loss **or** C/Dn signal at the close ▼
13. Place an order to sell **TQQQ** at the next day's open

Reitsma's NETS – NITRO as of July 23, 2026

Performance as of July 23, 2026

Tracking Since: December 29, 2015



Supercharge Your ETF Performance

All of these ETF trading systems are great
opportunities to make serious money
using Nasdaq-100 ETFs!

VectorVest

Options for Stock Traders

11:00 AM – 12:00 PM

Why Options?

Every investor should be using Options as a strategic part of their investment plan, and it doesn't have to be complex!

Why Options?

We use Options for leverage, protection, and to add income to your portfolio.

Let's discuss the basic Options trades that all investors should know.

The *All-New* Options LaunchPad

Options LaunchPad can help any investor, regardless of experience level, identify the best trades in seconds.

The Long Call

We buy Calls because they offer limited risk and a less expensive way to take advantage of a stock moving up.

Covered Calls

Remember the quote from Lee Lowell?
All investors should be using Covered Calls to
generate additional income on stocks they
already own.

Protective Puts

Buying Puts on your stocks helps protect you
during market pullbacks and from events such as
earnings. Protective Puts guarantee a sell price on
your stock no matter what the market does.

Options for Stock Traders

Options LaunchPad makes it easier than ever
to Profit, Provide, and Protect!

VectorVest

Lunch Served

12:00 PM – 1:00 PM

Afternoon Session

VectorVest

Elevating Your Swing Trading: Techniques for Precision and Profit

1:00 PM – 1:45 PM

The 50-50 Strategy

The 50-50 Strategy is a disciplined trend-following strategy designed to help traders enter established trends after a healthy pullback.

Best suited for:

- Swing traders (days to weeks)
- Position traders (weeks to months)
- Longer-term investors seeking lower-risk entries

Core Principles

The 50-50 Strategy by Dr. Charles Schaap

The 50-50 Strategy combines trend, momentum, and timing to identify high-probability trade setups.

The strategy focuses on four key elements:

- Trade in the direction of the primary trend.
- Wait for price to pull back to the 50-day Moving Average.
- Use the 20-period RSI to confirm momentum.
- Apply the same process to daily, weekly, or intraday charts.

Relative Strength Index (RSI)

Relative Strength Index (RSI)

- The Relative Strength Index (RSI), developed by J. Welles Wilder Jr., is one of the most widely used momentum indicators in technical analysis.
- RSI measures the speed and strength of price movement on a scale from **0 to 100**, helping traders identify periods when momentum may be overextended.

Relative Strength Index (RSI)

Reading RSI

RSI helps identify when buying or selling pressure may be reaching an extreme.

General Guidelines

- **Above 70** – Momentum may be becoming overextended (overbought).
- **Below 30** – Selling pressure may be nearing exhaustion (oversold).

These levels should be used as context—not automatic buy or sell signals.

Adjusting RSI Sensitivity

The RSI lookback period determines how quickly the indicator responds to changes in price.

Longer Lookback Period

- Responds more slowly to price movement.
- Produces fewer trading signals.
- Reduces short-term fluctuations.
- Provides more stable readings.

Shorter Lookback Period

- Responds more quickly to price movement.
- Produces more trading signals.
- Reacts more strongly to short-term fluctuations.
- May generate more false signals.

The appropriate setting depends on the trader's timeframe and desired level of sensitivity.

RSI Can Also Measure Trend Strength

RSI is commonly used to identify overbought and oversold conditions, but it can also help confirm the direction of a trend.

Using the **20-period RSI**:

- **Above 50** indicates bullish momentum.
- **Below 50** indicates bearish momentum.
- A move from below 50 to above 50 signals improving momentum.
- A move from above 50 to below 50 signals weakening momentum.

Within the 50/50 Strategy, the 50 level helps determine whether short-term momentum supports the broader trend.

Defining the Intermediate and Long-Term Trends

The 50-day and 200-day Moving Averages provide a quick visual assessment of a stock's overall trend.

50-Day Moving Average

- Represents the intermediate-term trend and helps identify potential pullback opportunities.

200-Day Moving Average

- Represents the longer-term trend and provides broader market context.
- When both Moving Averages are rising, the stock is generally in an established uptrend. When both are falling, the stock is generally in an established downtrend.
- The relationship between these two Moving Averages creates the foundation of the 50/50 Strategy.

50-50 Strategy (Bullish)

A bullish setup begins with an established uptrend and a controlled pullback.

Entry Checklist

- ✓ 50-day and 200-day Moving Averages are rising.
- ✓ Price pulls back toward the 50-day Moving Average.
- ✓ 20-period RSI remains above 50.
- ✓ Enter using a buy stop above the previous day's high.

Initial Stop

Place the initial stop **\$0.25 below the reversal candle low**.

Managing the Trade

Consider taking profits or exiting the position when one or more of the following occurs:

- RSI reaches or exceeds 70.
- Price closes below the 50-day Moving Average.
- A bearish reversal candlestick forms.
- The trend shows signs of breaking down.

Bullish 50-50 Example Chart for (CAT)



50-50 Strategy (Bearish)

Trading Established Downtrends

The Bearish 50-50 Strategy applies the same principles as the bullish setup but in reverse. Rather than buying pullbacks in an uptrend, the objective is to sell short after a rally into resistance within an established downtrend.

Ideal for:

- Swing traders
- Active traders
- Bearish market environments

Core Principles

The Bearish 50-50 Strategy combines **trend, momentum, and timing** to identify high-probability short-selling opportunities.

The strategy focuses on four key elements:

- Trade in the direction of the primary downtrend.
- Wait for price to rally into the 50-day Moving Average.
- Use the 20-period RSI to confirm bearish momentum.
- Enter only after price shows signs of reversing lower.

Defining the Downtrend

Before considering any short trade, confirm that the primary trend is bearish.

Trend Checklist

- ✓ 200-day Moving Average is declining.
- ✓ 50-day Moving Average is declining.
- ✓ Price is trading below both Moving Averages.
- ✓ The 50-day MA remains below the 200-day MA.

The greater the separation between the Moving Averages, the stronger the downtrend tends to be.

Confirming Momentum with RSI

Momentum should support the bearish trend.

Look for:

- 20-period RSI below 50
- RSI remaining below 50 during the rally
- Momentum beginning to weaken as price approaches the 50-day Moving Average

A rally with weak RSI often signals that sellers remain in control.

Bearish Entry Rules

A short setup begins with an established downtrend followed by a controlled rally.

Entry Checklist

- ✓ 50-day and 200-day Moving Averages are declining.
- ✓ Price rallies toward the 50-day Moving Average.
- ✓ 20-period RSI remains below 50.
- ✓ Price forms a bearish reversal.
- ✓ Place a sell stop below the previous day's low.

Initial Stop

Place the initial stop **\$0.25 above the high of the reversal candle.**

Managing the Trade

Consider covering the short position when one or more of the following occurs:

- RSI falls to 30 or below.
- Price closes above the 50-day Moving Average.
- A bullish reversal candlestick develops.
- The downtrend begins to weaken.

Remain disciplined and avoid allowing profitable trades to reverse into losses.

Bearish 50-50 Example Chart for (NOW)



Pro Tip

Not all trends are created equal.

The strongest opportunities often occur in stocks where the **50-day and 200-day Moving Averages** are **both rising and clearly separated**, reflecting strong and sustained buying pressure.

Common Mistake to Avoid

Don't buy a stock simply because it ranks highly.

Always review the chart first to confirm:

- The trend is intact.
- The setup matches your strategy.
- The reward justifies the risk.

A great stock can still be a poor trade if the timing is wrong.

VectorVest

Break

1:45 PM – 2:00 PM

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Coaches Panel Discussion

2:00 PM – 3:00 PM

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Taking Control: Turning Your Plan into Action

3:00 PM – 3:15 PM

Taking Control: Turning Your Plan into Action

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Thank you for attending our
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Stock Market Master Class!

We'll see you in Tampa,
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(details to follow)

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Coaching Group Meet-up

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