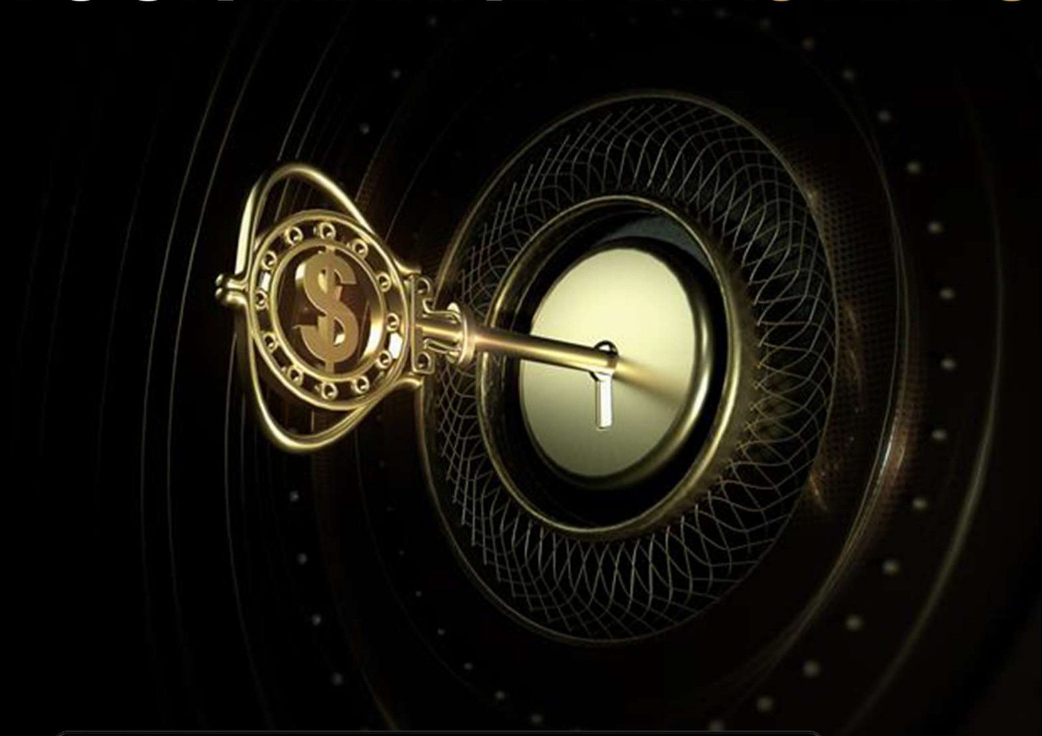
2026 TWO-DAY INVESTMENT SEMINAR

FEBRUARY 20-21, 2026 | TAMPA, FL

AGENDA & WORKBOOK

STOCK MARKET MASTER CLASS



Special Notice

VectorVest, Inc. will do everything it can to insure the safety of your personal possessions while you are attending the Seminar. If you would like us to watch your computer during lunch, please take it to our registration table, where you will receive a claim check for it. In any event, we cannot assume any responsibility for lost or missing personal property.

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 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 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

February 20, 2026

9:00 AM	Welcome & Course Introduction
9:05 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
2:00 PM	Elevating Your Swing Trading: Techniques for Precision and Profit
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

9:05 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 stock upside potential.

Are earning 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 your portfolio 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 where 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 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 Dr. David Paul moments.

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

<u>Get Step 1 wrong — and the rest doesn't matter.</u>

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 System 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 9,897 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)

- <u>Definition</u>: Ratio of Buy to Sell ratings of all the stocks in the database.
- <u>Purpose</u>: 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 ***<u>upturn</u>*** 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 ***<u>downturn</u>*** 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)

- <u>Definition</u>: An indicator of price direction, magnitude and momentum.
- <u>Purpose</u>: 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 the 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 – 2:00 PM

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

<u>Relative Safety</u>

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***."*

<u>Stocks, Strategies and Common Sense</u>

Dr. Bart DiLiddo

Crafting a Secure Retirement

Quality Retirement Searches

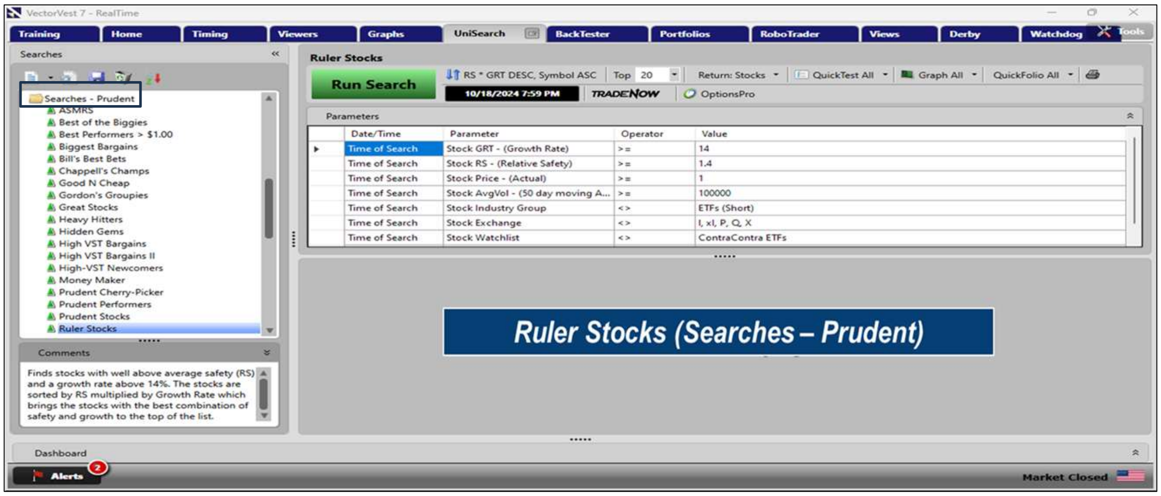
- Ruler Stocks (Searches - *Prudent*)
- Premier Growth Stocks (Searches - *Retirement*)
- Blue Chip Dividend Payers (Searches - *Retirement*)
- Pale Blue Chips (Searches - *Conservative*)

Crafting a Secure Retirement

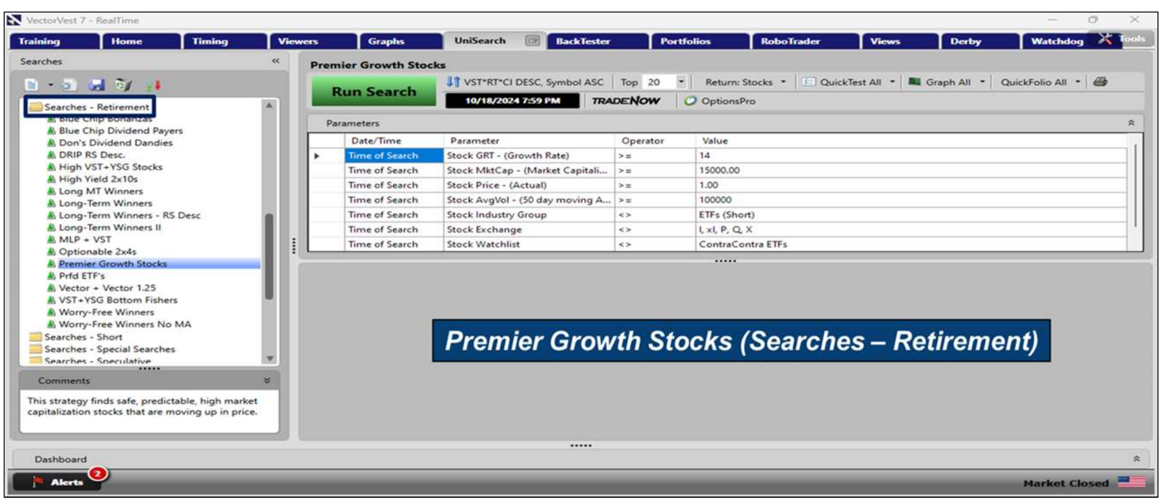
Profit

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

Crafting a Secure Retirement



Crafting a Secure Retirement



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 * (Annual Dividends Per Share/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

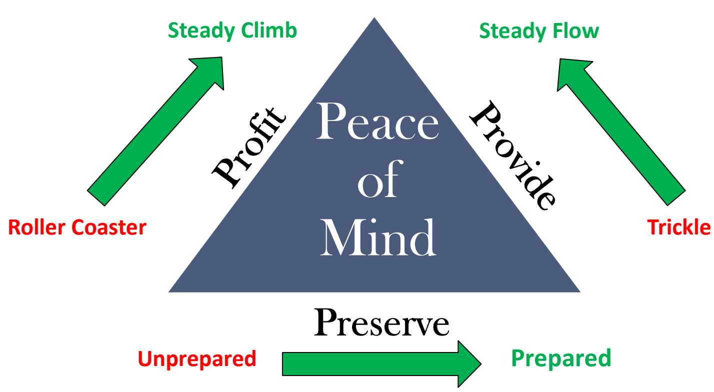
"The interesting thing about investing is that it's *not*
like the Olympics.

***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 Buffet**

Crafting a Secure Retirement



Crafting a Secure Retirement

DG (Dividend Growth):

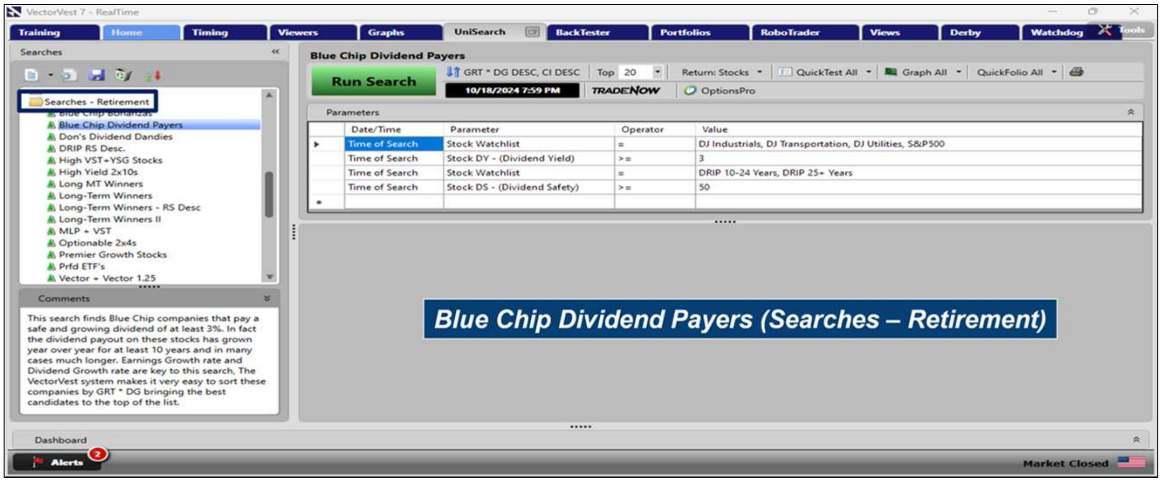
- A forecasted annual growth rate of a company's dividend, based on historical dividend payments and dividend predictability.
- It is a subtle, yet an important indicator of a company's financial performance.
- It also provides some insight into the board's outlook and the company's ability to increase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



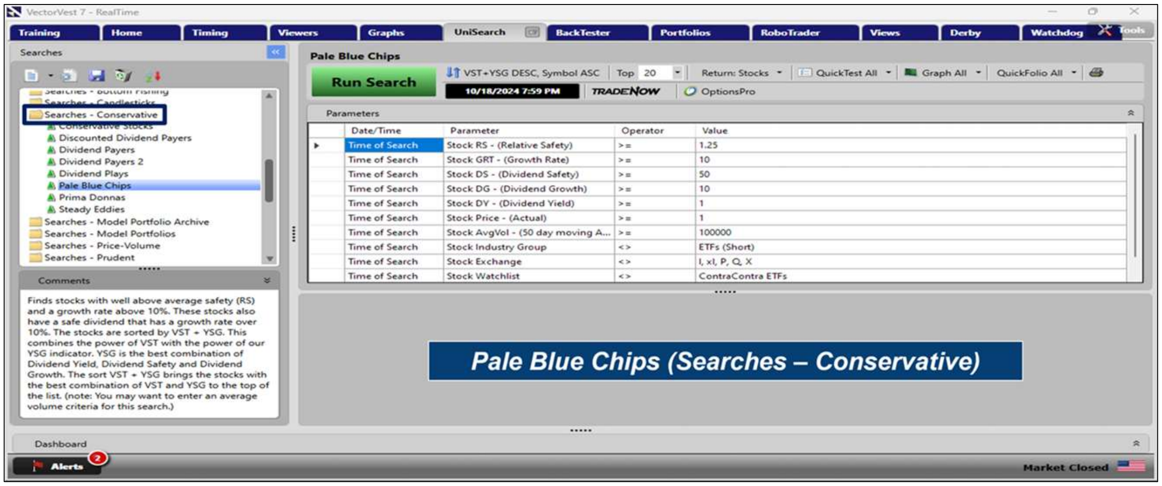
Crafting a Secure Retirement

"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."*

<u>Stocks, Strategies and Common Sense</u>

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

2025 Dividend Income

Portfolio	Month	YTD
Blue Chip Dividend Payers	$391.33	$2,458.07
Ruler Stocks	$6.26	$161.53
Prima Donnas	$204.69	$1,018.97
YTD TOTALS:		$3,638.57

*As of Dec. 29, 2025

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

2025 Buy-Write Portfolio

15% return with 75% Winning Trades

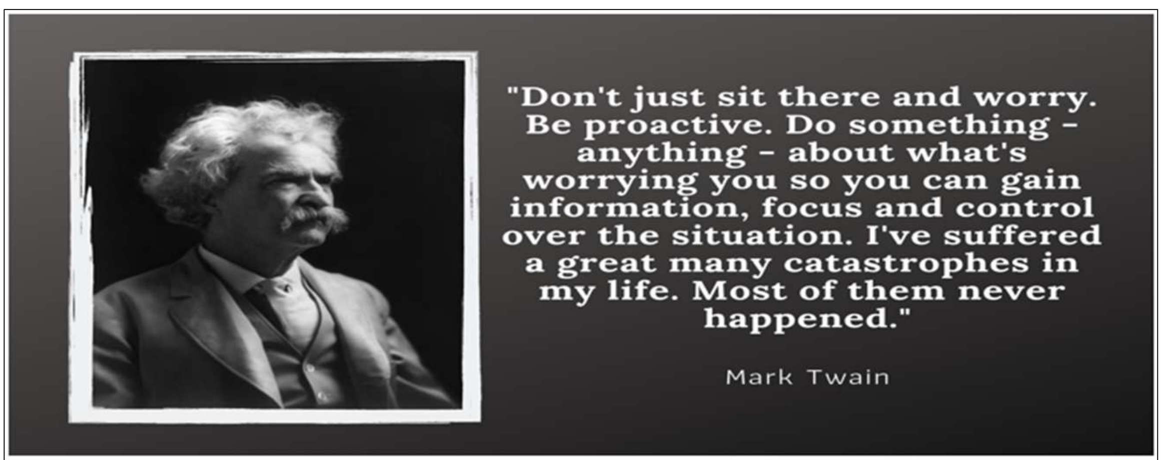
*As of Dec. 29, 2025

Crafting a Secure Retirement

Preserve

Risk Management Using Protective Puts

Crafting a Secure Retirement



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

Elevating Your Swing Trading:

Techniques for

Precision and Profit

2:00 PM – 2:45 PM

Elevate Your Swing Trading

- Swing Trading is a style of trading that involves holding assets for several days to weeks to capture short-to-medium term gains.
- Techniques using technical analysis, risk management, market timing, and other specific strategies are employed to enhance trade precision and ultimately maximize returns.

Elevate Your Swing Trading

The Holy Grail

The Concept Behind the Holy Grail Setup: This setup aims to capitalize on a price retracement, allowing traders to enter in the direction of an emerging or ongoing trend. It is versatile and can be applied as both a swing trading and a day trading strategy.

Elevate Your Swing Trading

Essential Principles

1. **Trade with the Trend:** Align your trades with the prevailing direction.
2. **Seek Confirmation:** Wait for signals to confirm the setup before entering.
3. **Manage Your Trades:** Continuously monitor and manage each position to maximize potential and minimize risk.

The Holy Grail

Bullish Entry Rules:

1. A 14-period ADX must initially be greater than 30 and rising, identifying a strongly trending market.
2. Look for a retracement in price down to the 20-period Simple Moving Average (SMA).
    - Typically, the price retracement will be accompanied by a turndown in the ADX.
3. When the price touches the 20-period SMA, place a buy-stop-limit above the previous day's high price.

The Holy Grail

ADX (Average Directional Index) is a technical analysis indicator used to measure the strength of a trend, regardless of its direction. Developed by J. Welles Wilder, the ADX is typically calculated over a 14-period timeframe and ranges from 0 to 100.

- **High ADX (above 25 or 30)** indicates a strong trend, either bullish or bearish.
- **Low ADX (below 20)** suggests a weak or non-trending market.

ADX is widely used by traders to confirm the strength of a trend and decide whether to stay in a trade or wait for better trend conditions.

The Holy Grail

Exit Criteria:

- Once the position is filled, set a protective sell stop at the latest swing low.
- As profits grow, trail the stop and consider exiting at the most recent swing high.
- If the stock shows potential for further gains, consider partially exiting at the swing high while tightening the stop on the remaining position.
- For a new trade setup, ensure the ADX rises above 30 again before another retracement to the 20-day SMA is tradable.

The Holy Grail (Bullish)

The Holy Grail

Bearish Entry Rules:

1. A 14-period ADX must initially be greater than 30 and rising, identifying a strongly trending market.
2. Look for the price to move up towards the 20-period Simple Moving Average (SMA).
   - Typically, the price retracement will be accompanied by a turndown in the ADX.
3. When the price touches the 20-period SMA, place a sell stop below the previous day's low price.

The Holy Grail

Exit Criteria:

- Once the position is filled, set a protective buy stop at the latest swing high.
- As profits grow, trail the stop and consider exiting at the most recent swing low.
- If the stock shows potential for further gains, consider partially exiting at the swing low while tightening the stop on the remaining position.
- For a new trade setup, ensure the ADX rises above 30 again before another rally to the 20-day SMA is tradable.

The Holy Grail (Bearish)

EMA Squeeze Swing Trading Strategy

What is the EMA Squeeze Trading Strategy?

The EMA (Exponential Moving Average) Squeeze Swing Trading Strategy is a technical trading approach that involves using EMAs along with Bollinger Bands to identify periods of low volatility (a “squeeze”) that might lead to price breakouts.

EMA Squeeze Swing Trading Strategy

Essential Principles

- The exponential moving average (EMA) is preferred because it tracks the price trend more closely, reducing lag. By analyzing the slope of three moving averages after a squeeze, we can confirm if a trend change is occurring and assess its likelihood of continuing.
- After a pullback or a period of low activity, the three moving averages begin to rise and "squeeze" together before separating, forming an upward slope.
- When VectorVest's Relative Timing (RT) indicator rises and registers higher lows, it decreases the likelihood of a false signal. The 50-day moving average is included in the chart to confirm that the price is above an institutional buying level.

EMA Squeeze Swing Trading Strategy

Essential Principles

- A Buy signal is triggered early in the trend's development, while a Sell signal occurs early as the trend starts to fade. The RT falls, and the EMAs squeeze together before separating as they begin to decline. An early Sell warning is given when the trend is weakening, shown by the fast and medium EMAs rolling over and squeezing together. When the fast 5-EMA crosses below both the medium and slow EMAs, cautious investors will consider selling.

EMA Squeeze Swing Trading Strategy

Buy Conditions:

- Price is above the 50-MA.
- The 5-EMA is above the 8-EMA, and the 8-EMA is above the 13-EMA.
- RT is trending upwards.

Sell Conditions:

- The 5-EMA closes below both the 8-EMA and 13-EMA.

EMA Squeeze Swing Trading Strategy

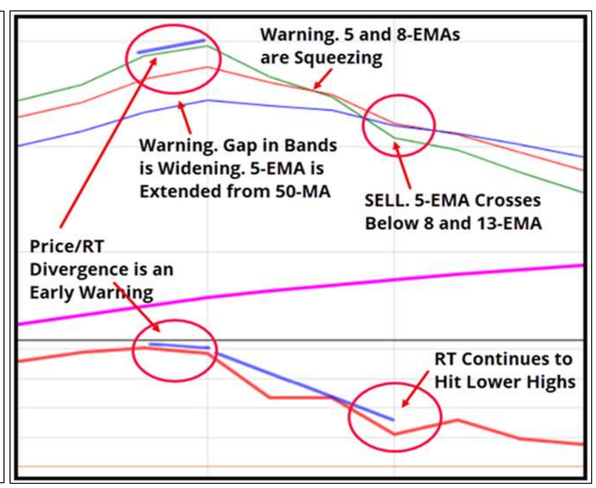
Buy Conditions:

- **Price is above the 50-MA.**
- **The 5-EMA is above the 8-EMA, and the 8-EMA is above the 13-EMA.**
- **RT is trending upwards.**

EMA Squeeze Swing Trading Strategy

Sell Conditions:

- The 5-EMA closes below both the 8-EMA and 13-EMA, signaling a prudent exit.



EMA Squeeze

Swing Trading Portfolio - 2025

Jockey Club Portfolio - 2025

Elevate Your Swing Trading

These techniques will help you elevate your Swing Trading performance!

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 Dec. 18, 2025

Total Gain = 332.22%

CROR = 17.79%

Ruler Stocks – PL Prudent

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 10% Loss

Jan. 2, 2024 to Dec. 18, 2025

Total Gain = 122.08%

CROR = 50.23%

Hot Stock Portfolio – 50% Gain or 10% Loss

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 Dec. 18, 2025

Total Gain = 78.51%

CROR = 21.65%

Pale Blue Chips

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 <u>everything</u> when Bottom-Fishing!

Risk, Reward & Personality

Bottom-Fishing Approach

Silber's Singles/BMB

April 10, 2025 to Aug. 22, 2025

Total Gain = 83.12%

Silber’s Singles/BMB

QuickTest - Silber's Singles/BMB

4/10/2025 - 8/22/2025 Stream Run Test Reset Sort

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

Symbol	Begin Price	End Price	% Price Cha	Total ARR
FLNC	3.86	7.54	95.34%	259.86%
SDA	2.63	2.33	-11.41%	-31.09%
JVA	3.15	4.16	32.06%	87.40%
RAIL	4.71	8.98	90.66%	247.11%
EBS	4.26	9.23	116.67%	318.00%
HIMS	26.81	44.57	66.24%	180.56%
FNKO	4.60	3.12	-32.17%	-87.70%
BTDR	7.60	13.35	75.66%	206.22%
WULF	2.24	9.16	308.93%	842.06%
SMTC	27.00	51.09	89.22%	243.20%
Average:	$8.686	$15.353	83.12%	226.56%

Compare To: VVC

Symbol	Begin Price	End Price	% Price Cha	Total ARR
VVC	62.89	75.739	20.43%	55.69%

Risk, Reward & Personality

Prudent, Aggressive, Conservative, Speculative?

Which one of these investment styles
rings ***<u>your</u>*** bell?

VectorVest

Special Presentation

4:00 PM

VectorVest

Cocktail Reception

VectorVest

Stock Market Master Class

End of Day One

VectorVest

Stock Market Master Class

Start of Day Two

Agenda

February 21, 2026

9:00 AM	ETF Master Class: Understanding Traditional, Leverages and Inverse Funds
9:45 AM	Break
10:00 AM	Supercharge Your ETF Performance
11:00 AM	One Symbol, One Trade, One Set of Rules for Income
12:00 PM	Lunch Served
1:00 PM	The Near Perfect Indicator: Identifying Trades that Stack the Odds
2:00 PM	Break
2:15 PM	Taking Control: Turning Your Plan into Action
3:00 PM	Adjourn

Morning Session

VectorVest

ETF Master Class:

Understanding Traditional, Leveraged and Inverse Funds

9:00 AM – 10:00 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 guess-work 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

- Brandes US Value (**BUSA**)
- JPMorgan Global Select Equity (**JGLO**)
- Dimensional US Small Cap (**DFAS**)
- T. Rowe Price Dividend Growth (**TDVG**)

- ARK Innovation (**ARKK**)
- AdvisorShares Pure U.S. Cannabis (**MSOS**)
- MFS Active Value (**MFSV**)
- 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 <u>active</u> traders.

Popular 2x ETF Pairs

<u>Up Markets</u>

- SSO
- QLD
- DDM
- UWM

<u>Down Markets</u>

- 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

- Buys wrong fund based on confusion of company name or ticker.
- Fails to research ETF components and risks.
- Selects concentrated instead of diversified fund.
- Buys highly volatile fund.
- Never uses stops or defensive tactics.

Making Money with ETFs

Bullish ETFs

Consider using the bullish ETF search in up markets.

April 23, 2025 - DEW Up Call

QuickTest - ETF Pairs - Bullish

4/23/2025 - 10/10/2025 Stream Run Test Reset Sort

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

Symbol	Begin Price	End Price	% Price Cha	Total ARR
SHNY	74.46	116.02	55.82%	119.92%
NUGT	67.99	151.09	122.22%	262.60%
JNUG	67.48	164.65	144.00%	309.38%
UGL	35.118	49.42	40.73%	87.50%
GDXU	65.66	198.80	202.77%	435.66%
UPV	66.308	81.169	22.41%	48.15%
EFO	47.216	57.975	22.79%	48.96%
EZJ	37.876	46.284	22.20%	47.69%
AGQ	42.35	78.67	85.76%	184.26%
EDC	28.15	46.65	65.72%	141.20%
Average:	**$53.2608**	**$99.0728**	**78.44%**	**168.53%**

Compare To: SPX

Symbol	Begin Price	End Price	% Price Cha	Total ARR
SPX	5375.86	6552.51	21.89%	47.03%

Making Money with ETFs

Bearish ETFs

Consider using a bearish ETF search in down markets.

February 21, 2025 – DEW Down

QuickTest - ETF Pairs - Bearish

2/21/2025 - 4/23/2025 Stream Run Test Reset Sort

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

Symbol	Begin Price	End Price	% Price Cha	Total ARR
TZA	13.59	17.73	30.46%	182.41%
SRTY	19.62	25.70	30.99%	185.55%
TWM	45.97	56.39	22.67%	135.72%
SCC	19.48	23.499	20.63%	123.53%
MSTZ	20.40	6.38	-68.73%	-411.51%
TSLZ	3.155	3.29	4.28%	25.62%
SIJ	16.18	17.45	7.85%	47.00%
WEBS	31.80	39.89	25.44%	152.33%
HIBS	17.32	22.16	27.94%	167.32%
SCO	16.97	20.29	19.56%	117.14%
Average:	**$20.4485**	**$23.2779**	**12.11%**	**72.51%**

Compare To: VVC

Symbol	Begin Price	End Price	% Price Cha	Total ARR
VVC	70.785	65.33	-7.71%	-46.14%

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 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

Feb. 14, 2020 to Dec. 1, 2025

Total Gain = 91.95%

CROR = 11.91%

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 December 1, 2025

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

Dec. 29, 2015 to Dec. 1, 2025

Total Gain = 1,622.38%

CROR = 33.21%

Supercharge Your ETF Performance

QQQ ENTRY

VVC is in a Confirmed Down (C/Dn)

One day ago, the 10 Day MA RT <= 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

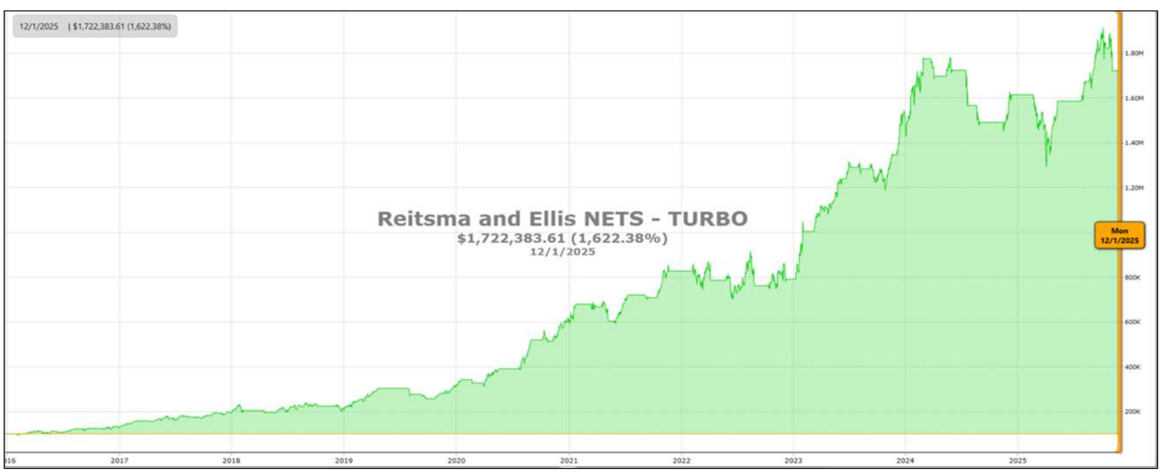
Buy **QLD** at the next day's open

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

QLD EXIT

Closing price >= 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 as of December 1, 2025



Supercharge Your ETF Performance

Can we ramp up the performance even more?

Supercharge Your ETF Performance

Triple Leverage on the NASDAQ 100

Reitsma's NETS - NITRO

Dec. 29, 2015 to Dec. 1, 2025

Total Gain = 8,506.42%

CROR = 56.66%

Supercharge Your ETF Performance

QQQ ENTRY

VVC is in a Confirmed Down (C/Dn)

One day ago, the 10 Day MA RT <= 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

VVC is in a Confirmed Up (C/Up)

RT <= 1.4 at the current day's close

Buy **TQQQ** at the next day's open

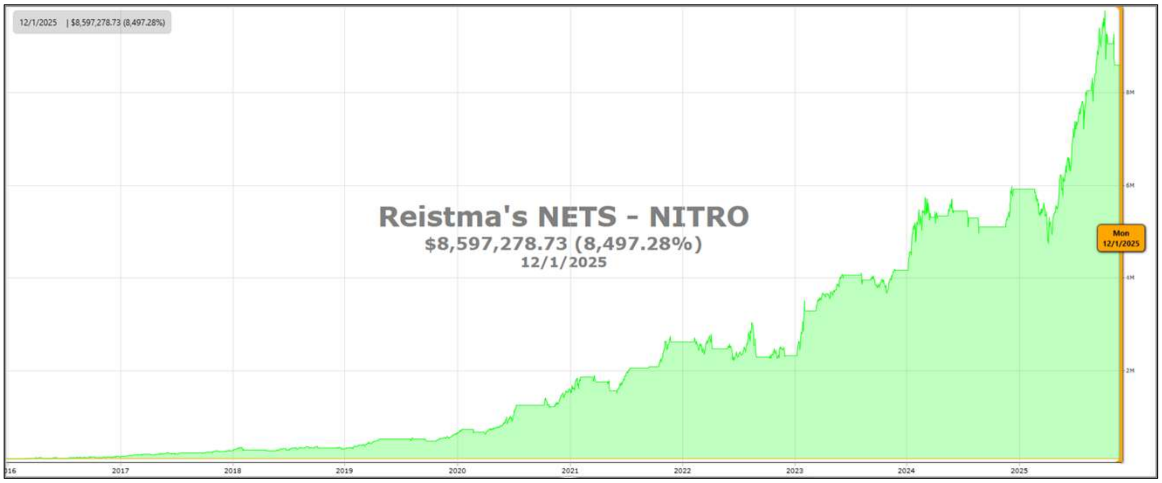
Set 50% gain and 5% loss stop using the next day's open

TQQQ EXIT

Closing price >= 50% gain **or** <= 5% loss **or** C/Dn signal at the close ▼

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

Reitsma's NETS – NITRO as of December 1, 2025



Supercharge Your ETF Performance

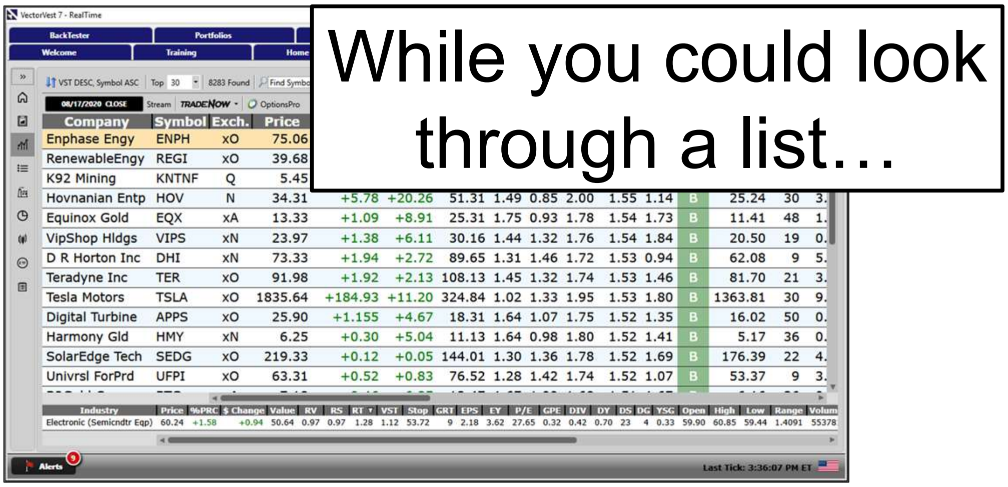
All of these ETF trading systems are great opportunities to make serious money using NASDAQ 100 ETFs!

VectorVest

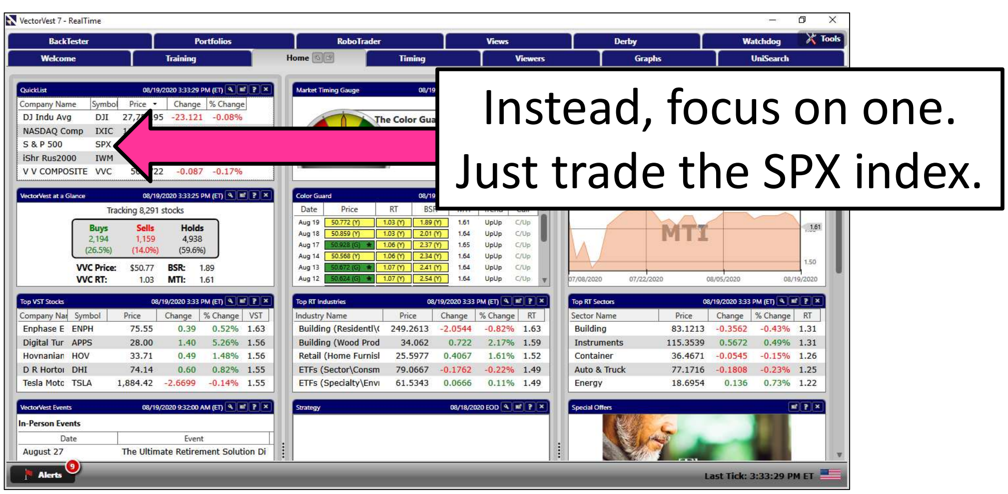
One Symbol, One Trade, One Set of Rules for Income

11:00 AM – 12:00 PM

One Symbol



One Symbol



Why the SPX?

1. Reduced analysis time.
2. No earnings or dividend worries.
3. No large gaps based on random news.
4. Cash based – no stock to exercise.
5. Heavily traded.
6. Tax advantages.

Tax Advantages

Index Options (SPX, etc.) are taxed at a 60/40 Capital Gains Split.

60% of Profits at Long Term Rate

40% at Short Term Rate

* You should consult your own tax and accounting advisor if you have any questions.

When to Trade

The Market has Trends.

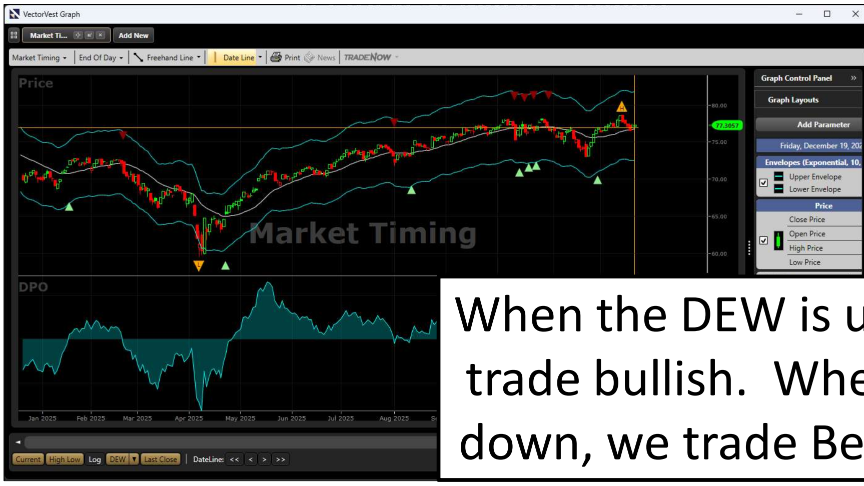
Don’t fight them, trade them!

When to Trade

We’ve tested various approaches to finding the right Market Timing Signal to trade the SPX, and after these tests one emerged as the best approach.

Do the DEW!

When to Trade



When the DEW is up, we trade bullish. When it's down, we trade Bearish.

When to Trade

This trade can be placed whenever you want,
any time of the day and any day during the week.

I place trades on Monday mornings around 11AM ET in conjunction with my live S&P Coaching, but feel free to place them anytime.

When to Trade

When we trade the SPX, our goal is to achieve ~60% trade success with a 1:1 Risk Reward over the course of a year of trades.

Keeping this in mind, don't try to outsmart the system. You'll have winners and losers during the year,

but probability and risk control will keep you on the right side of profits!

Controlling Your Risk

The enemy of any income trader is to take losses that far exceed the average gain.

Controlling Your Risk

SPX Income System

Risk:Reward of 1:1

Example:

- ➢Win $1,500 on a winner
- ➢Lose $1,500 on a loser

Making Money

60% Winners but…

W	W	W	L	L	W	L	W	W	W
L	L	L	W	W	L	W	W	W	W

You can still have a string of losers.

Controlling Your Risk

In a typical year with one trade per week,
31 Winners and 21 Losers.

Accept It.
Risk Control takes care of the rest.

Controlling Your Risk

To keep risk under control, risk no more than 3% of your capital per trade.

We don’t believe in get rich quick trading, build your profits safely without large drawdowns. Always live to fight another day!

Controlling Your Risk

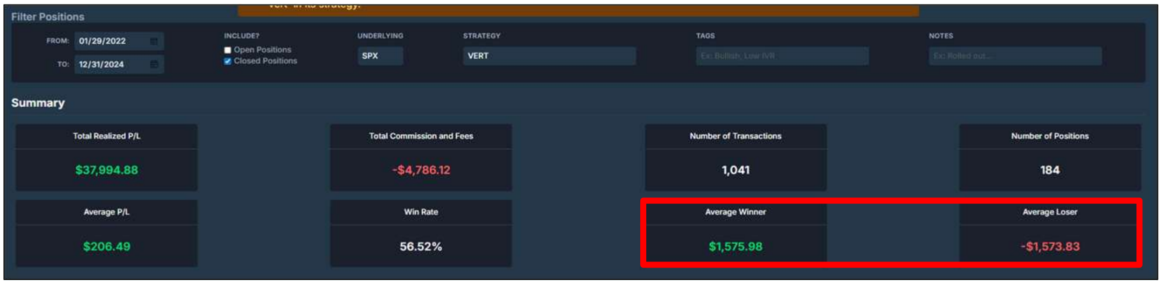
The typical 10 Point SPX Spread has a per contract gain of ~$150.00 and a loss of the same value.

This is a 1:1 Risk Reward.

On a 20 Point Spread it doubles to ~$300.00.

History (2015 – 2022)

History (2022-2024)



$50,000 in Capital. 5 Contracts with a 20 Point Spread.

History (2022-2024)

Wins	Losses	% Wins	Avg Win	Avg Loss	Avg Days in Trade	Total Commissions	Total Fees	Total Profit/Loss (Including Commissions & Fees)
25	23	52.1%	$1,469	-$1,297	3.5	$0.00	$0.00	$6,885.00

$50,000 in Capital. 5 Contracts with a 20 Point Spread.

History

Since 2015, the system has averaged a ~2% monthly return, with as little as one trade per week.

Keys to Controlling Your Risk

Trade 1 Contract with a 10-point spread for every $5,000 in your account.

Trade 1 Contract with a 20-point spread for every $10,000 in your account.

How it Works

During an Uptrend.

More likely to be in this area.

Less likely to be down here.

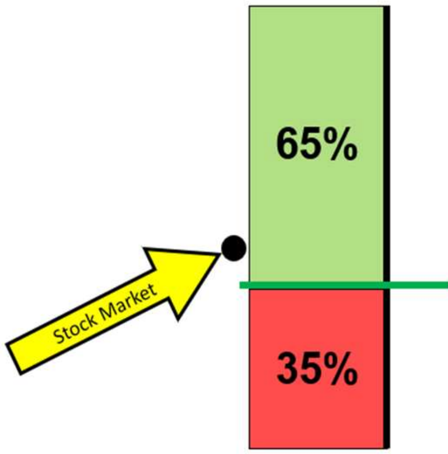
How it Works

During an Uptrend.

65%

35%

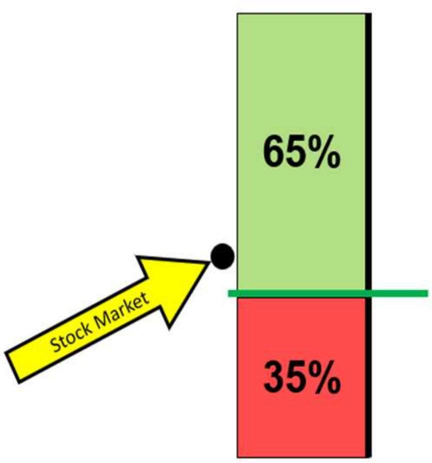
How it Works



In the next 25 Days.

Most likely won’t go below this price.

How it Works

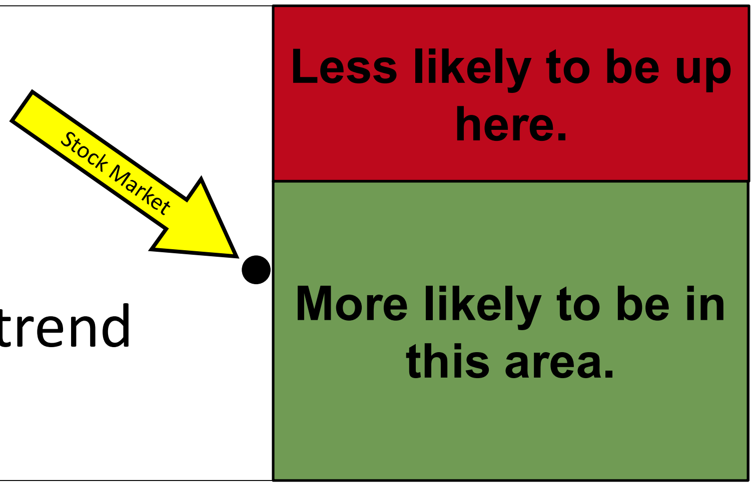


In the next 25 Days.

If it does, exit and take the loss.

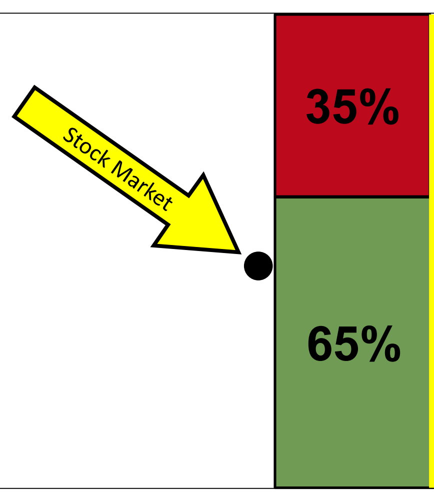
How it Works

During a Downtrend

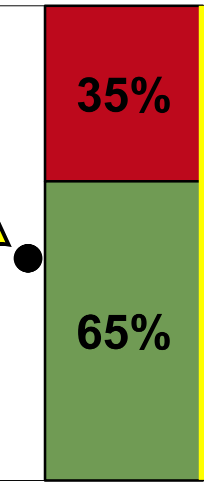


How it Works

In the next 18 Days.



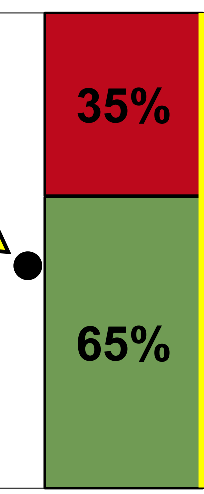
How it Works



Most likely won't go above that price.

In the next 18 Days.

How it Works



If it does, exit and move on.

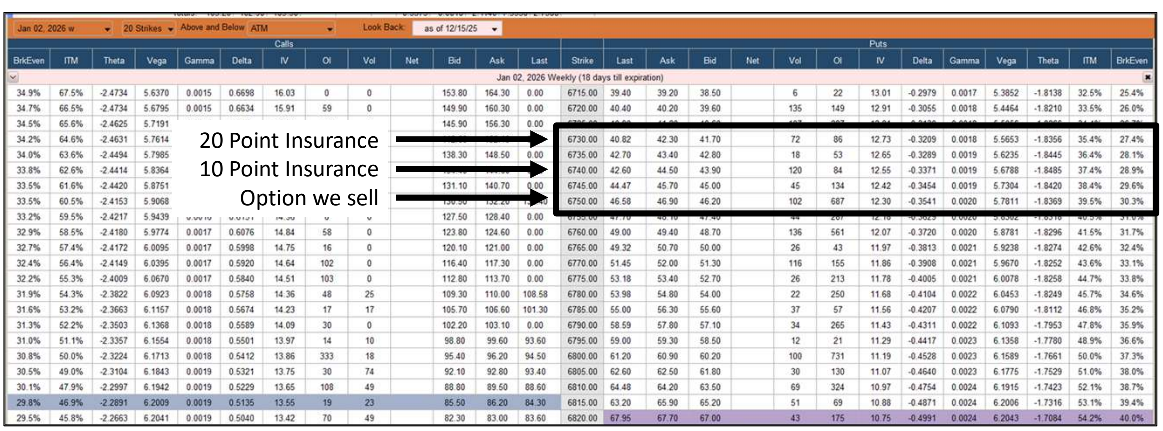
In the next 18 Days.

Trade Setup

When we are Bullish, we use Puts.

We sell a 35 Delta Put and then purchase an insurance strike 10-20 points *below* the Put we sold.

Trade Setup



Calls														Puts												
BrkEven	ITM	Theta	Vega	Gamma	Delta	IV	OI	Vol	Net	Bid	Ask	Last	Strike	Last	Ask	Bid	Net	Vol	OI	IV	Delta	Gamma	Vega	Theta	ITM	BrkEven
Jan 02, 2026 Weekly (18 days till expiration)																										
34.9%	67.5%	-2.4734	5.6370	0.0015	0.6698	16.03	0	0		153.80	164.30	0.00	6715.00	39.40	39.20	38.50		6	22	13.01	-0.2979	0.0017	5.3852	-1.8138	32.5%	25.4%
34.7%	66.5%	-2.4734	5.6795	0.0015	0.6634	15.91	59	0		149.90	160.30	0.00	6720.00	40.40	40.20	39.60		135	149	12.91	-0.3055	0.0018	5.4464	-1.8210	33.5%	26.0%
34.5%	65.6%	-2.4625	5.7191	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		145.90	156.30	0.00	[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
34.2%	64.6%	-2.4631	5.7614	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	6730.00	40.82	42.30	41.70		72	86	12.73	-0.3209	0.0018	5.5653	-1.8356	35.4%	27.4%
34.0%	63.6%	-2.4494	5.7985	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		138.30	148.50	0.00	6735.00	42.70	43.40	42.80		18	53	12.65	-0.3289	0.0019	5.6235	-1.8445	36.4%	28.1%
33.8%	62.6%	-2.4414	5.8364	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	6740.00	42.60	44.50	43.90		120	84	12.55	-0.3371	0.0019	5.6788	-1.8485	37.4%	28.9%
33.5%	61.6%	-2.4420	5.8751	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		131.10	140.70	0.00	6745.00	44.47	45.70	45.00		45	134	12.42	-0.3454	0.0019	5.7304	-1.8420	38.4%	29.6%
33.5%	60.5%	-2.4153	5.9068	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	6750.00	46.58	46.90	46.20		102	687	12.30	-0.3541	0.0020	5.7811	-1.8369	39.5%	30.3%
33.2%	59.5%	-2.4217	5.9439	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		127.50	128.40	0.00	[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
32.9%	58.5%	-2.4180	5.9774	0.0017	0.6076	14.84	58	0		123.80	124.60	0.00	6760.00	49.00	49.40	48.70		136	561	12.07	-0.3720	0.0020	5.8781	-1.8296	41.5%	31.7%
32.7%	57.4%	-2.4172	6.0095	0.0017	0.5998	14.75	16	0		120.10	121.00	0.00	6765.00	49.32	50.70	50.00		26	43	11.97	-0.3813	0.0021	5.9238	-1.8274	42.6%	32.4%
32.4%	56.4%	-2.4149	6.0395	0.0017	0.5920	14.64	102	0		116.40	117.30	0.00	6770.00	51.45	52.00	51.30		116	155	11.86	-0.3908	0.0021	5.9670	-1.8252	43.6%	33.1%
32.2%	55.3%	-2.4009	6.0670	0.0017	0.5840	14.51	103	0		112.80	113.70	0.00	6775.00	53.18	53.40	52.70		26	213	11.78	-0.4005	0.0021	6.0078	-1.8258	44.7%	33.8%
31.9%	54.3%	-2.3822	6.0923	0.0018	0.5758	14.36	48	25		109.30	110.00	108.58	6780.00	53.98	54.80	54.00		22	250	11.68	-0.4104	0.0022	6.0453	-1.8249	45.7%	34.6%
31.6%	53.2%	-2.3663	6.1157	0.0018	0.5674	14.23	17	17		105.70	106.60	101.30	6785.00	55.00	56.30	55.60		37	57	11.56	-0.4207	0.0022	6.0790	-1.8112	46.8%	35.2%
31.3%	52.2%	-2.3503	6.1368	0.0018	0.5589	14.09	30	0		102.20	103.10	0.00	6790.00	58.59	57.80	57.10		34	265	11.43	-0.4311	0.0022	6.1093	-1.7953	47.8%	35.9%
31.0%	51.1%	-2.3357	6.1554	0.0018	0.5501	13.97	14	10		98.80	99.60	93.60	6795.00	59.00	59.30	58.50		12	21	11.29	-0.4417	0.0023	6.1358	-1.7780	48.9%	36.6%
30.8%	50.0%	-2.3224	6.1713	0.0018	0.5412	13.86	333	18		95.40	96.20	94.50	6800.00	61.20	60.90	60.20		100	731	11.19	-0.4528	0.0023	6.1589	-1.7661	50.0%	37.3%
30.5%	49.0%	-2.3104	6.1843	0.0019	0.5321	13.75	30	74		92.10	92.80	93.40	6805.00	62.60	62.50	61.80		30	130	11.07	-0.4640	0.0023	6.1775	-1.7529	51.0%	38.0%
30.1%	47.9%	-2.2997	6.1942	0.0019	0.5229	13.65	108	49		88.80	89.50	88.60	6810.00	64.48	64.20	63.50		69	324	10.97	-0.4754	0.0024	6.1915	-1.7423	52.1%	38.7%
29.8%	46.9%	-2.2891	6.2009	0.0019	0.5135	13.55	19	23		85.50	86.20	84.30	6815.00	63.20	65.90	65.20		51	69	10.88	-0.4871	0.0024	6.2006	-1.7316	53.1%	39.4%
29.5%	45.8%	-2.2663	6.2041	0.0019	0.5040	13.42	70	49		82.30	83.00	83.60	6820.00	67.95	67.70	67.00		43	175	10.75	-0.4991	0.0024	6.2043	-1.7084	54.2%	40.0%

Trade Setup

When we are Bearish, we use Calls.

We sell a 35 Delta Call and then purchase an insurance strike 10-20 points *above* the Call we sold.

Trade Setup

Jan 02, 2026 w | 10 Strikes | Above and Below 6890.00 | Look Back: as of 12/15/25

Jan 02, 2026 Weekly (18 days till expiration)

Calls														Puts												
BrkEven	ITM	Theta	Vega	Gamma	Delta	IV	OI	Vol	Net	Bid	Ask	Last	Strike	Last	Ask	Bid	Net	Vol	OI	IV	Delta	Gamma	Vega	Theta	ITM	BrkEven
28.1%	41.7%	-2.1630	6.1793	0.0020	0.4641	12.92	112	11		69.90	70.80	70.93	6840.00	73.00	75.40	74.50		24	556	10.23	-0.5497	0.0025	6.1594	-1.6028	58.3%	42.6%
27.8%	40.7%	-2.1405	6.1627	0.0020	0.4537	12.81	24	5		67.00	67.80	62.30	6845.00	79.20	77.40	76.60		19	31	10.13	-0.5630	0.0025	6.1315	-1.5802	59.3%	43.2%
27.4%	39.6%	-2.1180	6.1418	0.0020	0.4432	12.71	1085	155		64.10	64.80	64.20	6850.00	79.40	79.50	78.70		85	503	10.00	-0.5766	0.0025	6.0957	-1.5491	60.4%	43.8%
27.0%	38.6%	-2.0995	6.1165	0.0020	0.4326	12.63	20	33		61.30	62.00	63.10	6855.00	78.10	81.70	80.80		19	117	9.85	-0.5905	0.0026	6.0508	-1.5070	61.4%	44.4%
26.7%	37.6%	-2.0625	6.0855	0.0020	0.4218	12.49	164	70		58.50	59.20	60.15	6860.00	83.13	83.90	83.00		35	221	9.70	-0.6047	0.0026	5.9973	-1.4664	62.4%	45.0%
26.3%	36.6%	-2.0247	6.0494	0.0020	0.4110	12.36	32	26		55.80	56.50	56.80	6865.00	83.60	86.20	85.30		23	64	9.57	-0.6192	0.0026	5.9352	-1.4285	63.4%	45.6%
25.9%	35.7%	-1.9882	6.0081	0.0020	0.4000	12.23	430	155		53.20	53.80	53.00	6870.00	90.40	88.50	87.70		111	272	9.44	-0.6340	0.0026	5.8642	-1.3921	64.3%	46.1%
25.5%	34.7%	-1.9532	5.9615	0.0020	0.3888	12.12	215	86		50.60	51.20	53.10	6875.00	90.22	90.90	90.10		74	445	9.32	-0.6491	0.0026	5.7838	-1.3553	65.3%	46.7%
25.1%	33.7%	-1.9211	5.9102	0.0020	0.3776	12.02	281	19		48.10	48.70	47.79	6880.00	89.10	93.40	92.60		10	100	9.15	-0.6643	0.0026	5.6879	-1.3004	66.3%	47.2%
24.6%	32.8%	-1.8919	5.8546	0.0020	0.3664	11.94	229	18		45.60	46.40	45.94	6885.00	[illegible]	[illegible]	[illegible]		[illegible]	35	8.99	-0.6800	0.0026	5.5807	-1.2471	67.2%	47.7%
24.2%	31.8%	-1.8626	5.7938	0.0020	0.3550	11.85	1678	103		43.30	43.90	43.08	6890.00	[illegible]	[illegible]	[illegible]		[illegible]	1631	8.83	-0.6961	0.0026	5.4623	-1.1953	68.2%	48.2%
23.8%	30.9%	-1.8185	5.7246	0.0020	0.3438	11.73	61	9		41.00	41.70	42.31	6895.00	[illegible]	[illegible]	[illegible]		[illegible]	125	8.70	-0.7124	0.0026	5.3347	-1.1466	69.1%	48.7%
23.3%	30.0%	-1.7685	5.6468	0.0020	0.3321	11.59	2590	110		38.70	39.30	40.03	6900.00	[illegible]	[illegible]	[illegible]		[illegible]	2888	8.52	-0.7290	0.0026	5.1876	-1.0873	70.0%	49.2%
22.9%	29.1%	-1.7267	5.5670	0.0020	0.3208	11.49	36	25		36.60	37.20	38.20	6905.00	[illegible]	[illegible]	[illegible]		[illegible]	14	8.32	-0.7462	0.0025	5.0185	-1.0191	70.9%	49.7%
22.4%	28.2%	-1.6866	5.4825	0.0020	0.3095	11.40	147	21		34.50	35.20	34.20	6910.00	[illegible]	[illegible]	[illegible]		[illegible]	147	8.14	-0.7637	0.0025	4.8385	-0.9546	71.8%	50.1%
22.0%	27.3%	-1.6448	5.3912	0.0020	0.2978	11.30	21	39		32.50	33.00	33.70	6915.00	[illegible]	[illegible]	[illegible]		[illegible]	28	7.94	-0.7828	0.0025	4.6348	-0.8853	72.7%	50.6%
21.5%	26.5%	-1.6080	5.2983	0.0020	0.2864	11.22	574	69		30.50	31.10	29.97	6920.00	122.59	121.30	110.20		13	78	7.85	-0.7969	0.0024	4.4578	-0.8352	73.5%	50.9%
21.0%	25.6%	-1.5615	5.1956	0.0019	0.2751	11.12	1024	59		28.70	29.20	29.60	6925.00	116.00	123.60	113.30		10	484	7.52	-0.8190	0.0023	4.1687	-0.7361	74.4%	51.3%
20.5%	24.8%	-1.5131	5.0877	0.0019	0.2642	11.03	149	10		26.90	27.60	26.90	6930.00	133.47	127.70	116.50		3	28	7.41	-0.8347	0.0023	3.9602	-0.6821	75.2%	51.6%
20.1%	24.0%	-1.4628	4.9721	0.0019	0.2529	10.92	25	8		25.10	25.90	25.54	6935.00	134.22	131.10	119.70		5	16	7.14	-0.8546	0.0022	3.6584	-0.5954	76.0%	52.0%
19.6%	23.2%	-1.4125	4.8507	0.0019	0.2414	10.81	313	107		23.50	24.00	23.11	6940.00	130.24	133.60	123.10		24	41	6.73	-0.8807	0.0021	3.2445	-0.4792	76.8%	52.4%

Option we sell
10 Point Insurance
20 Point Insurance

Trade Setup

This is done as 1 transaction with your broker called a Vertical Credit Spread.

Expiration

Based on testing, it's best to choose an expiration of 21–25 days, depending on the day of the week you place the trade.

We always use the Friday expirations.

Expiration

Results of testing, 1 contract with a 10-point spread.

SPX 35 Delta - 11 DTE	SPX	Jan 1, 2015 - Dec 29, 2025	$8,710	$19	57.9%
SPX 35 Delta - 18 DTE	SPX	Jan 1, 2015 - Dec 29, 2025	$9,025	$21	58.3%
SPX 35 Delta - 25 DTE	SPX	Jan 1, 2015 - Dec 29, 2025	$11,720	$31	60.2%

Expiration

If you trade on a Monday, the expiration will be 25 DTE.

Tuesday - 24

Wednesday - 23

Thursday - 22

Friday - 21

Expiration (Review)

Feel free to place the trade at any time, we place them on Mondays in conjunction with our live coaching.

But they can be placed anytime during the day and at any time during the week.

Profit Taking

We take profits at 50% of the credit received when we place the trade.

Profit Taking

^SPX	Last	Net	5 Day HV	20 Day HV	45 Day HV	60 Day HV	90 Day HV	180 Day HV	CIV Calls	CIV Puts
S&P 500 INDEX	6905.32	-0.42	6.25	8.75	12.25	13.00	11.50	12.75	0.00	0.00

Single Spread | Compare Spreads | Calls Ideal Strike Zone* | Puts Ideal Strike Zone*

Bull Put Spread | Edit Spread

Position		Expiration	Strike C/P	Price	Bid	Ask	Vol	OI	IV	Delta	Gamma	Theta	Vega	Rho	ITM	Brkeven
Sell	1	Jan 09, 2026 w	5820.00 Pu	Fill: 41.70	19.90	20.20	0	361	11.96	-0.2461	0.0023	-1.9488	3.5775	-0.4653	29.5%	34.7%
Buy	1	Jan 09, 2026 w	5800.00 Pu	Fill: 37.00	16.40	16.80	0	2,712	12.31	-0.2080	0.0021	-1.8416	3.2543	-0.3938	24.7%	28.6%
				Totals: -4.70	-3.50	-3.40				0.0381	-0.0003	0.1072	-0.3232	0.0715		

This trade was taken with a 4.70 Credit; we sold the Put for 41.70 and purchased the insurance for 37.00. We exit the trade when the price of the spread drops to 2.35.

Profit Taking

SPX 35 Delta - 25 DTE	SPX	Jan 1, 2015 - Dec 29, 2025	$11,720
SPX 35 Delta - 25 DTE 100% Profits	SPX	Jan 1, 2015 - Dec 29, 2025	$3,835
SPX 35 Delta - 25 DTE 25% Profits	SPX	Jan 1, 2015 - Dec 29, 2025	$6,695
SPX 35 Delta - 25 DTE 75% Profits	SPX	Jan 1, 2015 - Dec 29, 2025	$8,210

Taking profits too soon or too late will reduce the overall profits of the trade. 50% is the “sweet spot” of credit spreads for profit taking.

Profit Taking – How it works

Sell To Open

$$

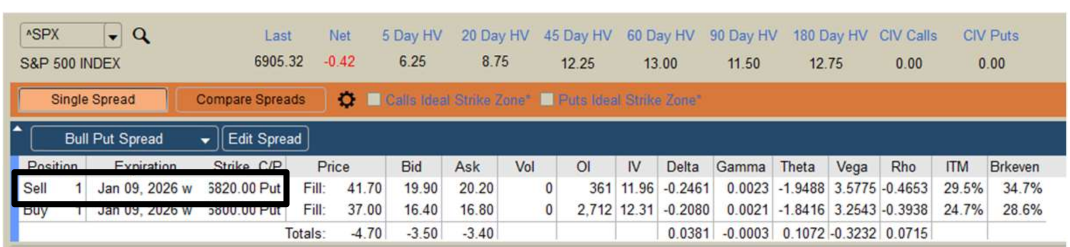
Buy To Close

$

$$-$ = $

Profit

Profit Taking



^SPX	Last	Net	5 Day HV	20 Day HV	45 Day HV	60 Day HV	90 Day HV	180 Day HV	CIV Calls	CIV Puts
S&P 500 INDEX	6905.32	-0.42	6.25	8.75	12.25	13.00	11.50	12.75	0.00	0.00

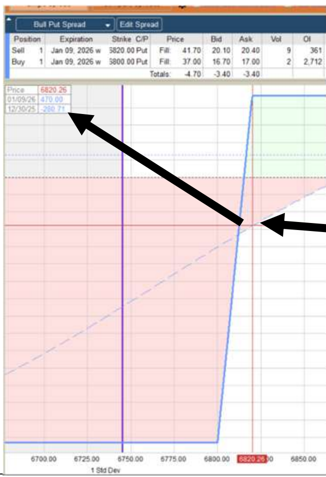
Single Spread | Compare Spreads | Calls Ideal Strike Zone* | Puts Ideal Strike Zone*

Bull Put Spread | Edit Spread

Position		Expiration	Strike C/P		Price	Bid	Ask	Vol	OI	IV	Delta	Gamma	Theta	Vega	Rho	ITM	Brkeven
Sell	1	Jan 09, 2026 w	6820.00 Put	Fill:	41.70	19.90	20.20	0	361	11.96	-0.2461	0.0023	-1.9488	3.5775	-0.4653	29.5%	34.7%
Buy	1	Jan 09, 2026 w	6800.00 Put	Fill:	37.00	16.40	16.80	0	2,712	12.31	-0.2080	0.0021	-1.8416	3.2543	-0.3938	24.7%	28.6%
				Totals:	-4.70	-3.50	-3.40				0.0381	-0.0003	0.1072	-0.3232	0.0715		

We exit the trade if the price of the SPX crosses the price of the Put Option we sold, in this case 6,820.00

Profit Taking



This would result in a loss of $280.00.

Profit Taking – How it works

Sell To Open
$$

Buy To Close
$$$

$$-$$$ = $
Loss

Profit Taking

The exit should optimally be done in real-time; some brokers will allow you to place a stop-loss at this level which can make the system nearly automated.

Summary

That’s it! No what if’s, no other rules.
Take the trade and you hit profits or a stop-loss.

That’s what makes the trade so simple.

Summary

Once you get the hang of the trade it can be done in as little as 2-3 minutes, and with a broker that supports stops, it can almost be automated.

A quick and easy 2% per month!

VectorVest

Lunch Served

12:00 PM – 1:00 PM

Afternoon Session

VectorVest

The Near Perfect Indicator:

Identifying

Trades that Stack the Odds

1:00 PM – 2:00 PM

The Near Perfect Indicator:
Identifying Trades that Stack the Odds

The Core Problem Traders Face:

Problem: Most traders lack objective, **repeatable entry timing.**

Impact:

- Uncertainty and second-guessing.
- Entries that are too early or too late.
- Unnecessary risk.
- Lack of consistency and low win-rates.

The Near Perfect Indicator:
Identifying Trades that Stack the Odds

This is the problem the Near Perfect Indicator (NPI) was designed to solve.

Let’s look at how the NPI appears visually on a chart.

Invest in strong companies at cyclical lows.
Walmart – DJI WatchList

Walmart – What this Chart Shows

The NPI Indicators and Tools

Relative Timing (RT): Price Action Radar

- **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 RT identifies **high momentum opportunities** often near the bottom of price cycles. The result is earlier entries, defined risk and far less guesswork.

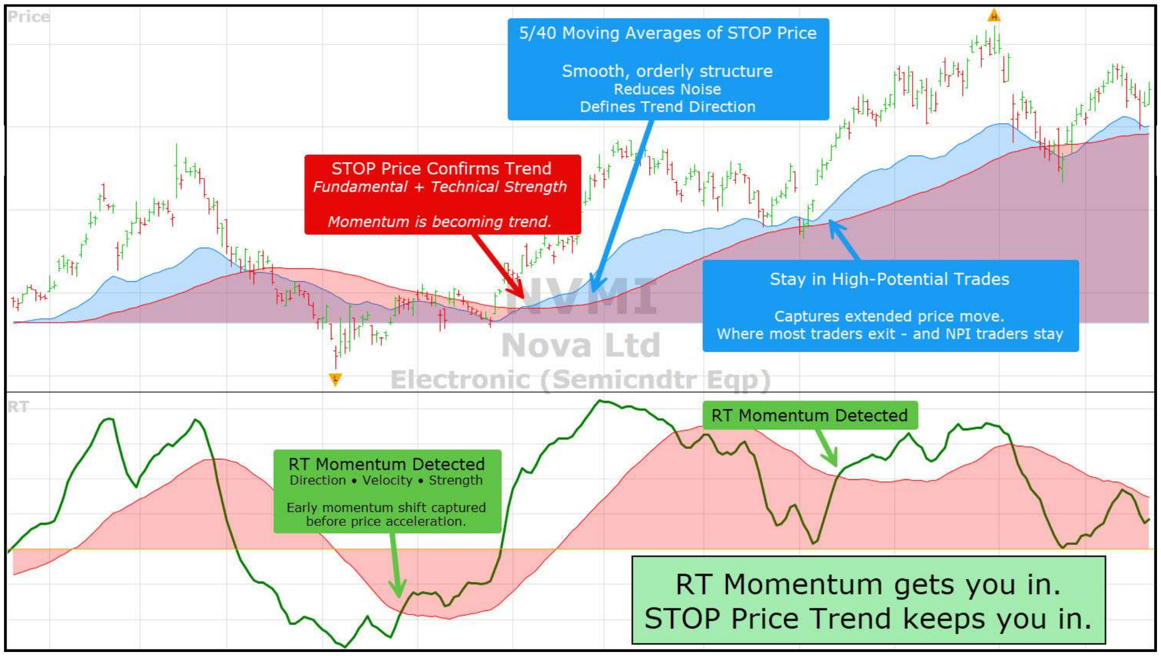
The NPI Indicators and Tools

From Entry to Staying Power: How the STOP Price Works

The STOP Price confirms the Trend:

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

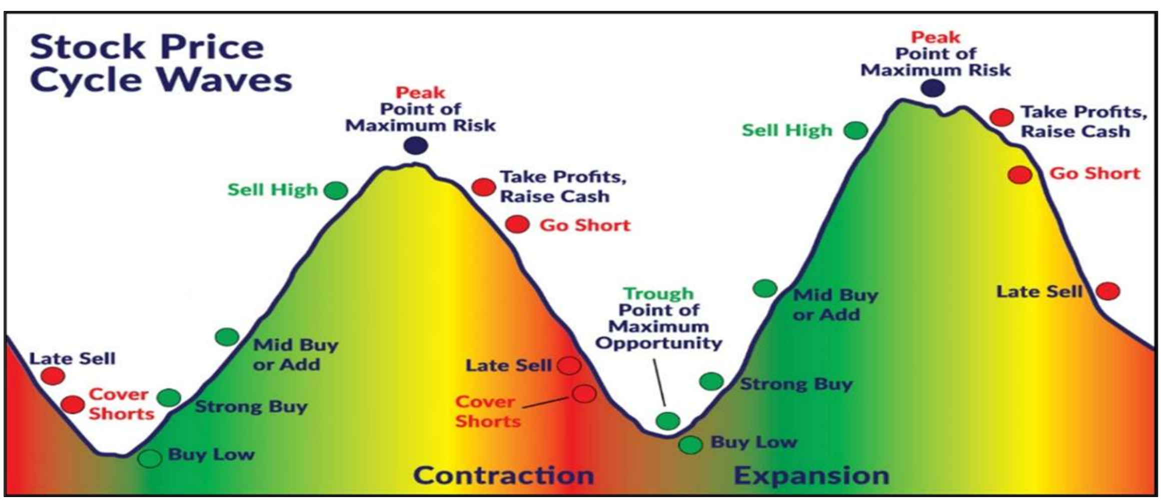
- **Defines** true price direction.
- **Displays** fundamental + technical strength.
- **Smoothed for clarity:** Uses 5 and 40-period moving averages of the STOP Price.
- **Helps avoid premature exits:** When the trend is confirmed, the STOP Price trend helps us stay with high-potential runners – and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



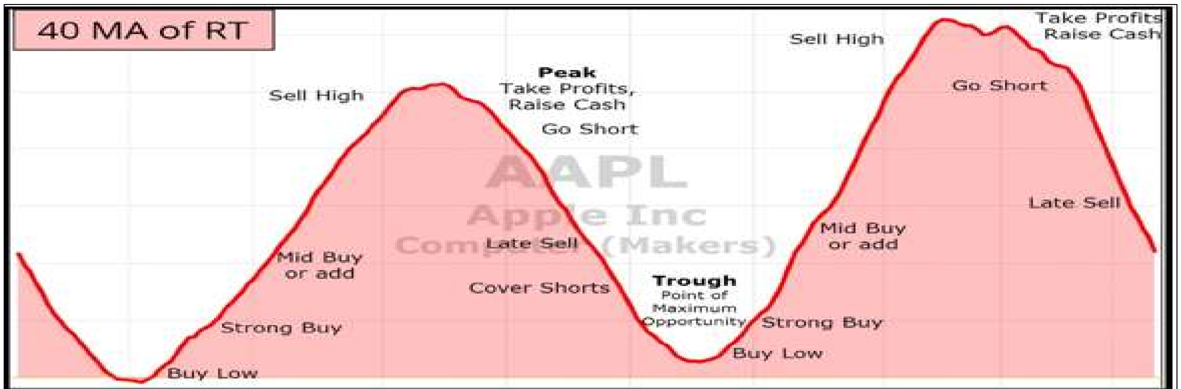
Nvidia – What this Chart Shows

Nvidia – What this Chart Shows

Reading the Stock Price Cycle Waves (RT 40-MA)



Reading the Stock Price Cycle Waves



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

Apple's 2-Year Performance using the NPI (2022 – 2024)

Costco – What this Chart Shows

Francis N.'s Idea for the NPI STOP Price Moving Averages

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 for the NPI STOP Price Moving Averages

The Long-term Hold Strategy Based On Francis N.'s Strategy

Avoid the Most Common Buying Mistake

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.

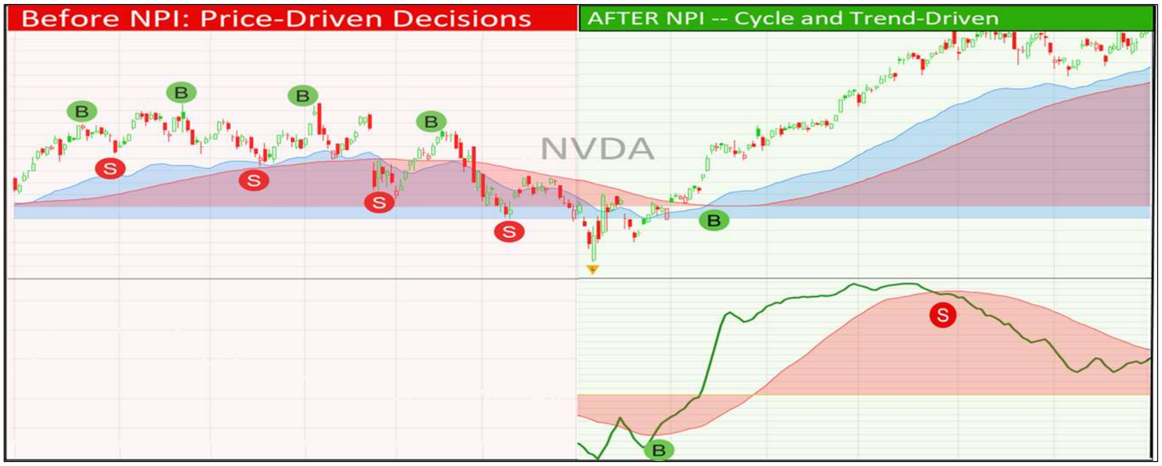
How the NPI Helps You Say ‘No’

Reject High-Risk Entries Before They Happen

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

Let’s illustrate this using case studies from a Special WatchList that we can create.

How the NPI Helps You Say 'No'



A WatchList of Top-Performing Stocks

40%/Year Gainers 10 Yr 5 Yr 3 Yr

Run Search | 520 Week Price Delta DESC, VST DESC, Symbol ASC | Top 100 | Return: Stocks | QuickTest All | Graph All | QuickFolio

12/17/25 CLOSE | TRADENOW | OptionsPro

Parameters

Date/Time	Parameter	Operator	Value	
Time of Search	Stock Price - (Split Adjusted)	Delta	520 week >= 400.00%	(Avg ARR 40% or higher over 10 years)
Time of Search	Stock Price - (Split Adjusted)	Delta	520 week Sorted Desc	(Sort is by top 10 Year ARR)
Time of Search	Stock Price - (Split Adjusted)	Delta	260 week >= 200.00%	(Avg ARR 40% or higher over 5 years)
Time of Search	Stock Price - (Split Adjusted)	Delta	104 week >= 40.00%	(Avg ARR 20% or higher over 2 years)
12/17/20	Stock Price - (Split Adjusted)	>	1	(Price was >1 on 12/17/20)
12/17/20	Stock AvgVol - (50 day moving Average Volume)	>	100000	(Avg Vol was > 100,000 on 12/17/20)

Company	Symbol	520 Week Price Delta	260 Week Price Delta
NVIDIA Corp	NVDA	20,371.86%	1,214.01%
Centrus Energy Corp	LEU	16,277.04%	692.15%
Sterling Infrastructure In	STRL	4,649.92%	1,382.33%
Camtek LTD	CAMT	4,640.69%	393.59%
Leonardo DRS	DRS	4,298.65%	211.19%
Axon Enterprise	AXON	2,988.15%	317.20%
Comfort Systems	FIX	2,968.72%	1,548.25%
Nova Ltd	NVMI	2,921.59%	335.28%
Arista Networks	ANET	2,385.98%	583.35%
Celestica Inc	CLS	2,362.77%	3,449.94%

The Power of Legging In and Out

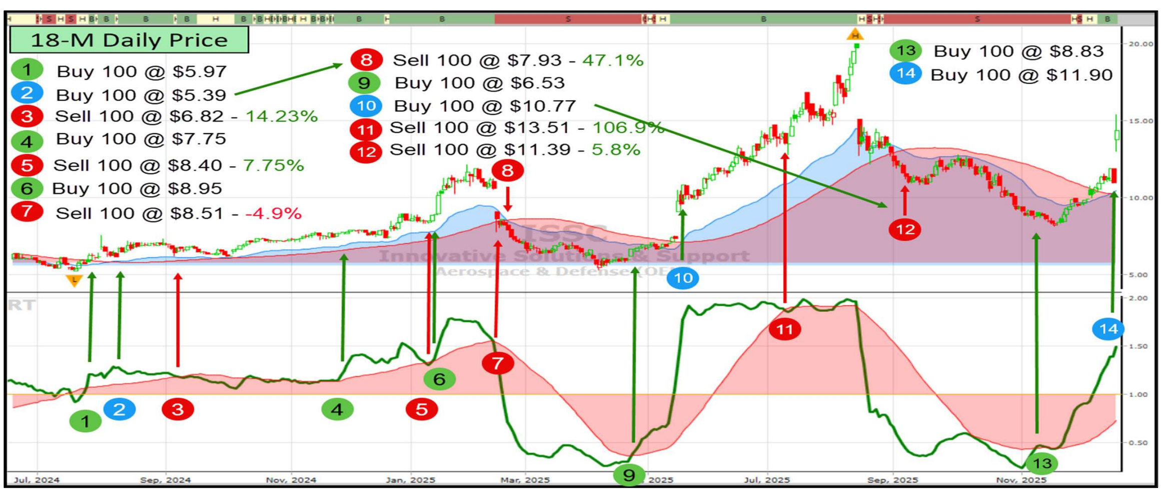
Market Timing Approach

- 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 In - Keeping It Simple

Finding NPI Candidates: Live Charts

- Stock Viewer–high VST, RS, CI and GRT ratings.
- VectorVest WatchLists or create your own.
- Searches from the Near Perfect Indicator Folder (ProTrader add-in Required).
- Top Searches from Derby Winners (Views or actual Derby).
- Trading Systems Viewer—study graphs of new holdings.

ProTrader VectorVest Searches:

Search for Daily NPI Crossovers

*Search Requires ProTrader Add-in for Technical Studies

**Filter using your favorite WatchLists

Action Steps for Timing

In Order of Earliest Signal to Conservative

Market Timing is Bullish

- Primary Wave is Up.
- Green Light in the Color Guard price column.
- Black Star in the Color Guard Green Light.
- DEW is Up.
- Underlying trend is UpUp.
- Confirmed Call is C/Up.

Thank You, and Additional Resources.

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

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Break

2:00 PM – 2:15 PM

VectorVest

Taking Control:

Turning Your Plan into Action

2:15 PM – 3:00 PM

Taking Control: Turning Your Plan into Action

Stay Informed

1. Read the VectorVest Views.
2. Watch the Daily Color Guard (DCGR) & Special Presentations.
3. Participate in Educational Webcasts & Courses.
4. Join the VectorVest Investor Community.

Taking Control: Turning Your Plan into Action

Follow a VectorVest Trading Plan that best matches your investment style.

1. Successful Investor Approach.
2. The Ultimate Retirement Solution.
3. Precision Swing Trading / Near Perfect Indicator.

Taking Control: Turning Your Plan into Action

Automate as much as possible to:

1. Free Up Time.
2. Reduce Stress and Emotion.
3. Produce Better Results.

Taking Control: Turning Your Plan into Action

Allow our industry leading coaches
to keep you headed down the right path
to *financial freedom*!

Taking Control: Turning Your Plan into Action

Be an Optimist!

Mission Statement

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

VectorVest

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Product Support: 1-888-658-7638
E-mail: support@vectorvest.com

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Thank you for attending our
Tampa Two-Day
Stock Market Master Class!

We'll see you in Las Vegas,
Fall 2026!

(details to follow)

vectorvest.com/live-events

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Stock Analysis & Portfolio Management System

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