

AGENDA & WORKBOOK

# 2023 Two-Day Investment Seminar

JANUARY 6 - 7, 2023

*Accelerate Your Profits in  
Up and Down Markets*





2023, Copyright VectorVest, Inc.

ALL RIGHTS RESERVED. No part of this publication may be reproduced in any form or by any means without the prior written permission of the publisher and the copyright holder, VectorVest, Inc.

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

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

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

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

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

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

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

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

## **Popular VectorVest Courses**

**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 - During this event, only \$295

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

**Uncovering Trends: Technical Analysis the Easy Way** - serves up a practical approach to trading some of the most popular and widely used technical indicators. We will take you by the hand and guide you through everything from market analysis, trade/indicator selection, trade execution and most importantly trade management. You'll learn when and why to use certain indicators and how to trade them. Regular price \$1,990 - During this event, only \$895

**Retirement Portfolio Transformation** - a step-by-step road map to a secure retirement. We will take you by the hand and guide you through the 3-Part Portfolio Management Method designed to protect and grow your retirement account and *retire with peace of mind*. After decades of working with clients, we've found the KEY to retiring when you want and how you want is through our 3-Part Portfolio Management Method. This includes a plan to grow your portfolio safely, a system to generate consistent income and a protection plan for capital preservation. Regular price \$995 - During this event, only \$495

# Morning Sessions – January 6<sup>th</sup>

09:00 AM	Welcome & Course Introduction
09:10 AM	The VectorVest System of Analyzing Stocks
10:10 AM	Break
10:30 AM	The Secret to Buying Low and Selling High
11:15 AM	Making Money the Easy Way
12:00 PM	Served Lunch



# Afternoon Sessions – January 6<sup>th</sup>

01:15 PM     Finding the Right Stocks for a  
Secure Retirement

02:10 PM     Break

02:30 PM     How to Build and Manage a  
Retirement Portfolio

03:15 PM     Situational Investing

04:15 PM     Break

05:00 PM     Special Presentation – Swing  
Trading Psychology



# Morning Sessions – January 7<sup>th</sup>

09:00 AM     The Anatomy of a Swing Trade

09:45 AM     Top Techniques for  
Trending/Channeling Markets

10:45 AM     Break

11:00 AM     The Near Perfect Indicator

12:00 PM     Leveraging Your Swing Trades

12:45 PM     Served Lunch





# Afternoon Sessions – January 7<sup>th</sup>

01:45 PM Options Paycheck Live

02:45 PM The Path to Securing  
Financial Freedom

03:15 PM Q&A Speaker Panel



*Day One*

*Morning Session*



VectorVest

# The VectorVest System of Analyzing Stocks

9:10 AM – 10:10 AM



## The VectorVest System

**VectorVest believes  
every investor should know:**

What a stock is really worth,

How safe it is and,

When to buy sell or hold.

***This is information you can't get anywhere else!***

## The VectorVest System

### What Your Stocks are Really Worth?

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

## The VectorVest System

### What Your Stocks are Really Worth?

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

## The VectorVest System

### What are Your Stocks Really Worth?

Super MicroCmp, SMCI carries a price of \$84.10 with a Value of \$107.57\*

Roblox Corp, RBLX carries a price of \$31.59 with a Value of \$3.24\*

*You should favor buying undervalued stocks*

\*VV Stock Viewer 12/09/2022



## The VectorVest System

### What is the Upside Potential of Your Stocks?

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

*Favor buying stocks whose RV is greater than 1.00*

## The VectorVest System

### What is the Upside Potential of Your Stocks?

Super MicroCmp, SMCI has a RV rating of 1.75\*

Roblox Corp, RBLX has a RV rating of 0.10\*

*SMCI has far better upside Potential over the long-term.*

\*VV Stock Viewer 12/09/2022

## The VectorVest System

### How Safe are Your Stocks?

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

*Favor buying stocks whose RS is more than 1.00*

## The VectorVest System

### How Safe are Your Stocks?

Super MicroComp, SMCI has a RS rating of 1.39\*

Roblox Corp, RBLX has a RS rating of 0.58\*

*An investment in SMCI carries far less risk than a similar investment in RBLX.*

\*VV Stock Viewer 12/09/2022

## The VectorVest System

### Are Your Stocks Rising in Price?

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

*Favor buying stocks whose RT is more than 1.00 and rising*

## The VectorVest System

### Are Your Stocks Rising in Price?

Super MicroCmp, SMCI has a RT rating of 1.62\*  
Roblox Corp, RBLX has a RT rating of 0.49\*

*SMCI is rising in price, while RBLX is  
falling in price*

\*VV Stock Viewer 12/09/2022

## The VectorVest System

### Do You Own Stocks with Good Combinations of Value, Safety and Timing?

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

*Favor buying stocks whose VST is more than 1.00*

## The VectorVest System

### Do You Own Stocks with Good Combinations of Value, Safety and Timing?

Super MicroComp, SMCI has a VST rating of 1.59\*

Roblox Corp, RBLX has a VST rating of 0.46\*

*SMCI has a much better combination of Value, Safety and Timing.*

\*VV Stock Viewer 12/09/2022

## The VectorVest System

### VectorVest Stop-Price

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

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

## The VectorVest System

### Price to Stop Comparison

Super MicroComp, SMCI carries a price of \$84.10 and a  
VV Stop price of \$73.03\*

Roblox Corp, RBLX carries a price of \$31.59 and a  
VV Stop price of \$32.79\*

*SMCI has a much better combination of Value, Safety and Timing.*

\*VV Stock Viewer 12/09/2022

## The VectorVest System

### The Bottom Line

All Factors are Considered in making a Buy, Sell, or Hold Recommendation

## The VectorVest System

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

**Sell** Price < Stop Price

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

## The VectorVest System

### The Bottom Line

Super MicroCmp, SMCI has been rated a **Buy** or **Hold** since 7/21/22\*

Roblox Corp, RBLX is rated a **Sell** or **Hold** since 1/6/22\*

*SMCI has a much better combination of Value, Safety and Timing.*

## The VectorVest System

Stock Viewer is your entrance into VectorVest.

It is an enormous spreadsheet of all VectorVest's indicators and parameters

## The VectorVest System

### “How I use Stock Viewer”

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

\*VV Views – 11/10/2006

## The VectorVest System

This is all the information you need to start making money with VectorVest!



# VectorVest

## Break

10:10 AM – 10:30 AM



# VectorVest

## The Secret to Buying Low and Selling High

10:30 AM – 11:15 AM



## Buying Low, Selling High

VectorVest believes in buying rising stocks in rising markets and selling falling stocks in falling markets.

## Buying Low, Selling High

The essence of making money in the stock market is the fine art of buying low, selling high.

## Buying Low, Selling High

How do we know when a stock's price  
is low?

## Buying Low, Selling High

What is low to a Buyer,  
is high to a Seller.  
Who is right?

## Buying Low, Selling High

By Definition: a stock's price is low when it is more likely to go up than it is to go down.

## Buying Low, Selling High

How does one know when a stock's price is more likely to go up than it is to go down?

## Buying Low, Selling High

Fundamental investors, who hold for the long-term, buy stocks when they see attractive situations regarding Value and Safety.

## Buying Low, Selling High

Value goes up when:  
Earnings go up,  
Inflation goes down, &  
Interest Rates go down



## Buying Low, Selling High

### Safety improves with:

Outstanding Financial Performance  
Consistent, Predictable Earnings Growth  
Above Average Earnings Growth  
Steady Increases in Stock Price  
Low Debt/Equity Ratio  
High Sales Volume

## Buying Low, Selling High

Technical investors, who are short-term traders, time their purchases when they expect a price to go up.

## Buying Low, Selling High

Key indicators of an imminent  
Price increase include:

- A Breakout
- An Up Trend
- Increasing Volume
- News

## Buying Low, Selling High

VectorVest is the only service that  
combines the power of fundamental  
valuation with the insights of  
technical analysis.

## Buying Low, Selling High

### The VectorVest Mantra

VectorVest advocates that investors buy Safe,  
Undervalued Stocks, Rising in Price.

(Are they “right” for you?)

## Buying Low, Selling High

High RS stocks usually are classified as Prudent  
or Conservative, and they have been proven to  
go up over time.

Let’s take a quick look!

Buying Low, Selling High

*The Secret Weapon*

Buying Low, Selling High

Market Direction:

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

\* Dr. Bart A. DiLiddo

## Buying Low, Selling High

### Let the Trend be Your Friend

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

## Buying Low, Selling High

The VectorVest Market Timing System has never failed to signal a major move in the market.

Buying Low, Selling High

The VectorVest  
Market Timing Graph

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

Buying Low, Selling High

The VectorVest Market Timing Graph is your key  
to success. Follow the signal that best fits your  
investment style.

Buying Low, Selling High

VectorVest is all you need to Buy Low &  
Sell High





# VectorVest

## Making Money the Easy Way

11:15 AM – 12:00 PM



## Making Money the Easy Way

Keep things simple and focus on these  
3 key elements:

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

## Making Money the Easy Way

### VectorVest WatchLists

Instantaneously gives you the answers to  
making better investment decisions.

## Making Money the Easy Way

### VectorVest WatchLists

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

## Making Money the Easy Way

### Use Rank Analysis

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

## Making Money the Easy Way

### Read the Graphs

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

## Making Money the Easy Way

### 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.

## Making Money the Easy Way

### The Color Guard functions like a traffic light

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

THE COLOR GUARD DOES NOT TELL YOU  
WHEN TO SELL.

## Making Money the Easy Way

### Three Yellow lights in the Color Guard:

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

The Primary Wave dictates the action!

## Making Money the Easy Way

### Become A Green Light Buyer

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

*-Dr. Bart A. DiLiddo  
(VV Views U.S. – 03/23/12)*

## Making Money the Easy Way

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

## Making Money the Easy Way

Watch the Daily Color Guard Reports for  
expert daily guidance.

## Making Money the Easy Way

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



# VectorVest

## SERVED LUNCH

12:00 PM – 1:15 PM



*Day One*

*Afternoon Session*



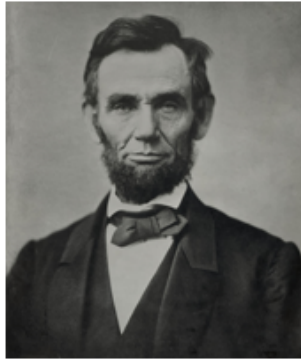
# VectorVest

## Finding the Right Stocks for a Secure Retirement

1:15 PM – 2:10 PM



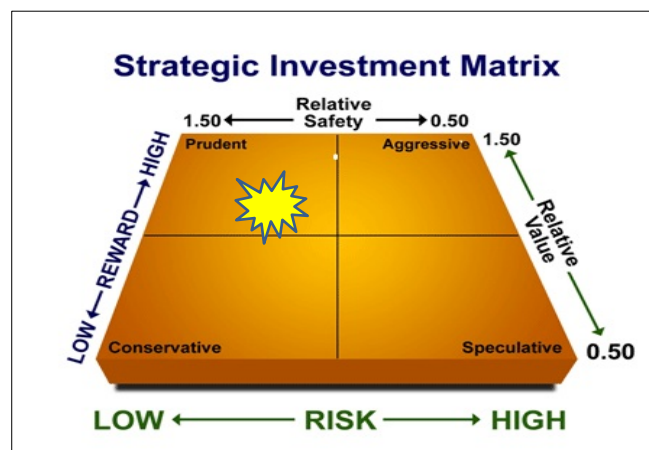
## Finding the Right Stocks For a Secure Retirement



Give me six hours to chop down a tree and I will spend the first four sharpening the axe.”

Abraham Lincoln

## Investment Styles & Strategies



## Finding the Right Stocks For a Secure Retirement

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

## Using UniSearch

### Stock Selection Searches

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

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



## Finding the Right Stocks For a Secure Retirement

### **Relative Safety**

An Indicator of Risk

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

## Using UniSearch

### Quality Retirement Searches

- Ruler Stocks
- Premier Growth Stocks
- Blue Chip Dividend Payers
- Pale Blue Chips
- Safe and Sound

# Using UniSearch

The screenshot shows the UniSearch interface with the 'Searches - Prudent' category selected in the left sidebar. The main panel displays the 'Ruler Stocks' search results. A 'Run Search' button is visible at the top. Below it, a table lists search parameters:

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 Avg/Std - (50 day moving A..	>=	100000
Time of Search	Stock Industry Group	<=	ETFs (Short)
Time of Search	Stock Exchange	<=	L v1, P, Q, X
Time of Search	Stock Watchlist	<=	Contra/Contra ETFs

Below the table, the title 'Ruler Stocks (Searches - Prudent)' is displayed in a blue box, followed by the instruction 'Run a Search to Display Results'.

# Using UniSearch

The screenshot shows the UniSearch interface with the 'Searches - Retirement' category selected in the left sidebar. The main panel displays the 'Premier Growth Stocks' search results. A 'Run Search' button is visible at the top. Below it, a table lists search parameters:

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 Avg/Std - (50 day moving A..	>=	100000
Time of Search	Stock Industry Group	<=	ETFs (Short)
Time of Search	Stock Exchange	<=	L v1, P, Q, X
Time of Search	Stock Watchlist	<=	Contra/Contra ETFs

Below the table, the title 'Premier Growth Stocks (Searches - Retirement)' is displayed in a blue box, followed by the instruction 'Run a Search to Display Results'.

# Using UniSearch

The screenshot shows the UniSearch interface with the 'Blue Chip Dividend Payers' search results. The left sidebar lists various search categories, with 'Searches - Retirement' highlighted. The main panel displays the search parameters and results.

**Blue Chip Dividend Payers (Searches – Retirement)**

Run a Search to Display Results

Date/Time	Parameter	Operator	Value
Time of Search	Stock Watchlist	=	DI Industrials, DI Transportation, DI Utilities, S&P500
Time of Search	Stock DY - (Dividend Yield)	>=	3
Time of Search	Stock Watchlist	=	DRIP 10-34 Years, DRIP 25+ Years
Time of Search	Stock DS - (Dividend Safety)	>=	50

# Using UniSearch

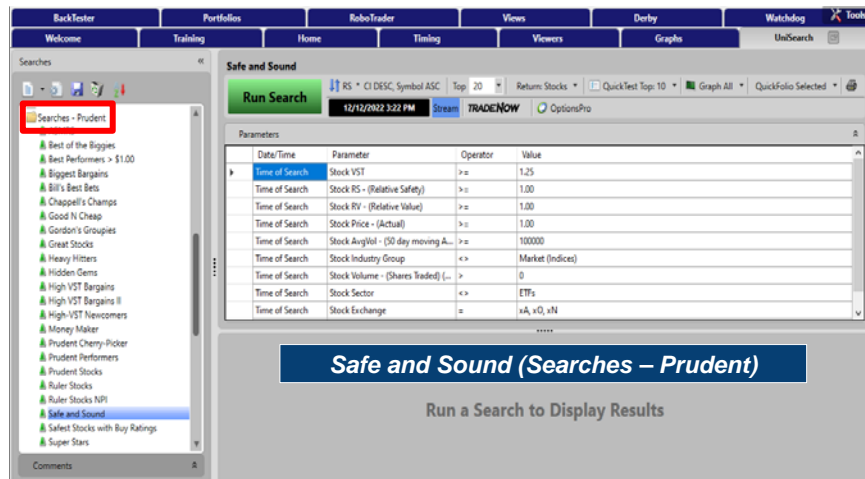
The screenshot shows the UniSearch interface with the 'Pale Blue Chips' search results. The left sidebar lists various search categories, with 'Searches - Conservative' highlighted. The main panel displays the search parameters and results.

**Pale Blue Chips (Searches – Conservative)**

Run a Search to Display Results

Date/Time	Parameter	Operator	Value
Time of Search	Stock RS - (Relative Safety)	>=	1.25
Time of Search	Stock GRT - (Growth Rate)	>=	10
Time of Search	Stock DS - (Dividend Safety)	>=	50
Time of Search	Stock DG - (Dividend Growth)	>=	10
Time of Search	Stock DY - (Dividend Yield)	>=	1
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, N, P, Q, X

# Using UniSearch



# Using UniSearch

## Performance QuickTest

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

## Using UniSearch

### Build a Watchlist

Creating a watchlist of high-quality stocks allows you to cherry pick from a strong roster of candidates!



# VectorVest

## Break

2:10 PM – 2:30 PM





# VectorVest

## How to Build and Manage a Retirement Portfolio

2:30 PM – 3:15 PM



## The Ultimate Retirement Solution

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

## The Ultimate Retirement Solution

“Just keep making more money!”

~ Dr. Bart DiLiddo ~

## The Ultimate Retirement Solution

*"You can retire with peace of mind knowing that you can steadily grow your portfolio, generate income & preserve your capital."*

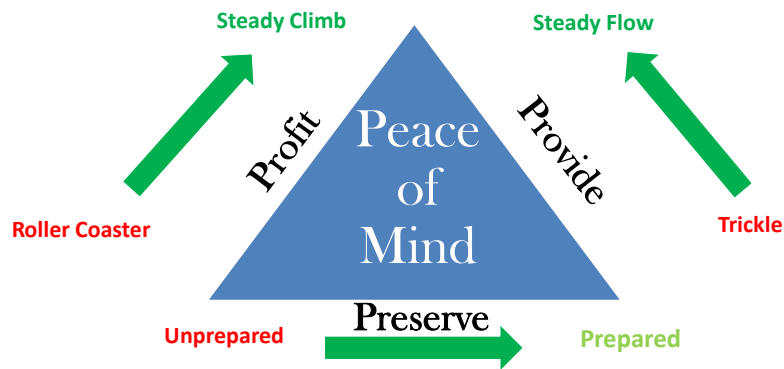


## The Ultimate Retirement Solution

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

Where work is optional, and Retirement is affordable!

## The Ultimate Retirement Solution



## The Ultimate Retirement Solution

Profit

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

# The Ultimate Retirement Solution

## Relative Safety

An Indicator of Risk

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

# The Ultimate Retirement Solution

"Good portfolio management starts with buying the right stocks"

- Dr. Bart DiLiddo



1969 World Series Champion New York Mets

## The Ultimate Retirement Solution

### Stock Safety Checklist:

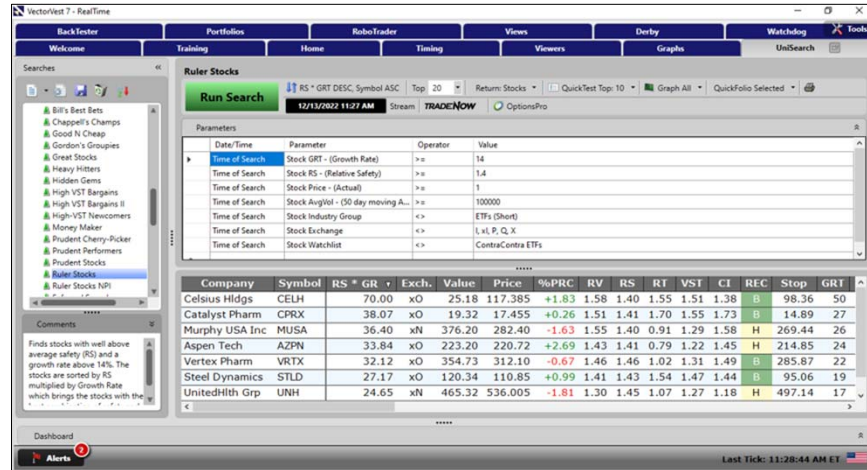
- ✓ Earnings consistency
- ✓ Company size
- ✓ Price behavior
- ✓ Business longevity
- ✓ Dividend history
- ✓ Debt to equity ratio



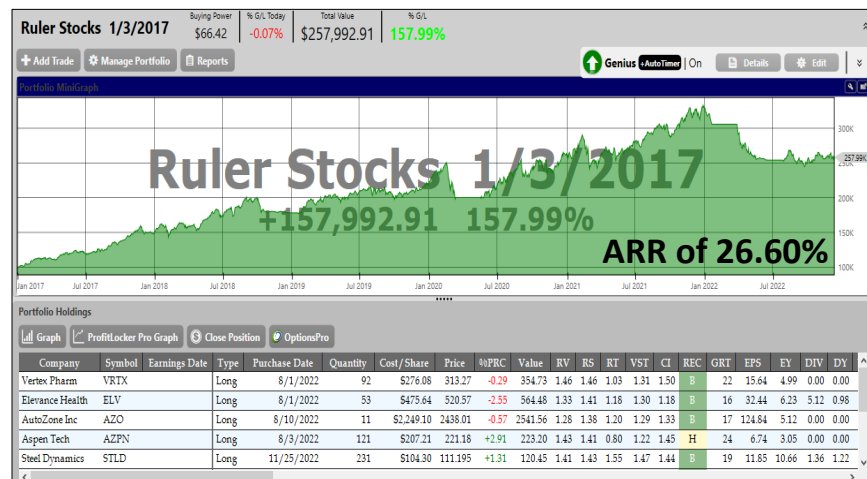
## The Ultimate Retirement Solution



# The Ultimate Retirement Solution



## Ruler Stocks





## The Ultimate Retirement Solution

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

## The Ultimate Retirement Solution

Provide

Steady Income Flow From  
Dividends and Covered Calls –  
Part I

## Dividends & Distributions



## Dividends & Distributions

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

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

## Dividends & Distributions

### **Dividend:**

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

### **Dividend Yield:**

*Amount a company pays out relative to its share price.*

*DY = Annual Dividends Per Share/Price Per Share.*

## Dividends & Distributions

### **VectorVest Dividend Indicators**

DIV = Annual Dividend (\$)

DY = Dividend Yield (Annual)

DS = Dividend Safety

DG = Dividend Growth

YSG = Yield, Safety & Growth Vector

## Dividends & Distributions

### **DS (Dividend Safety):**

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

## Dividends & Distributions

### **DG (Dividend Growth):**

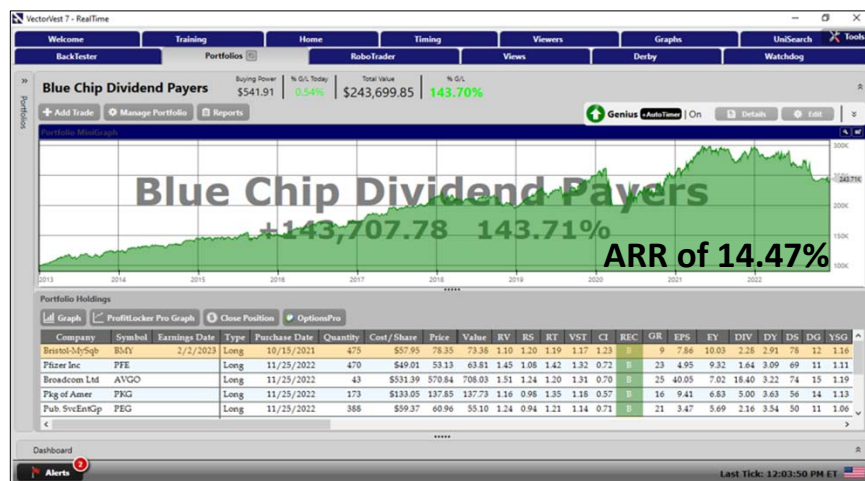
- A forecasted annual growth rate of a company's dividend based on historical dividend payments and dividend predictability.
- It is a subtle yet important indicator of a company's financial performance.
- It also provides some insight into the board's outlook and the company's ability to increase earnings.

# Dividends & Distributions

## YSG (Yield, Safety, Growth):

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

## Blue Chip Dividend Payers



## The Ultimate Retirement Solution

Provide

### Steady Income Flow From Dividends and Covered Calls – Part II

## Covered Calls

“If you own shares of stock (minimum 100 shares) and you’re not selling call options against them, then you are throwing away money. How’s that? Well, *there are traders out there who will give you money today for the right to take your stock away 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 there are investors who aren’t taking advantage of it!”\*

Lee Lowell – Get Rich with Options

## Covered Calls

Buy 100 XYZ Shares	@ \$60.00
Sell 1 XYZ 45-day 62.50 Call	@ \$ 2.00
Net Debit	\$58.00

At Expiration (45 days)

- If XYZ is above \$62.50  
Cost Basis - \$58.00

\$4.50 = 7.5%

- If XYZ is below 62.50 at expiration:

- Long 100 XYZ at a Cost Basis of \$58.00 or 3% lower than original price of \$60.

- If XYZ below 58.00 at expiration losses will occur.

## Covered Calls

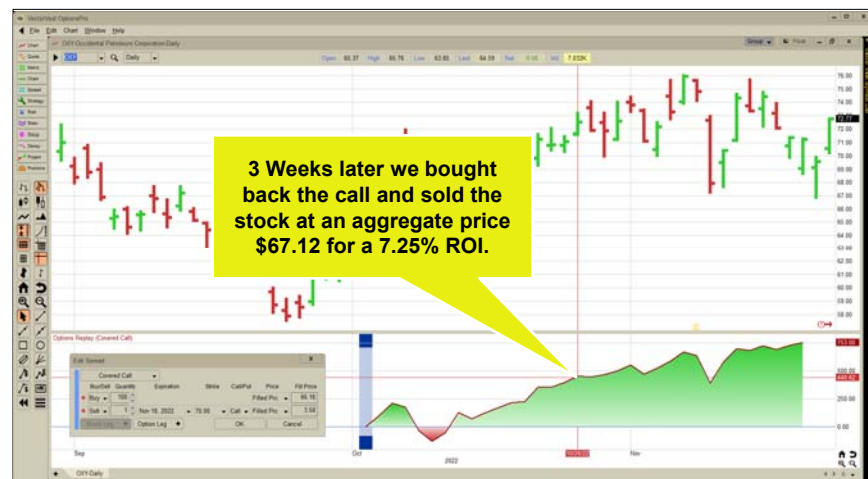
### Buy-Write Guidelines

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

# Covered Calls



# Covered Calls





## The Ultimate Retirement Solution

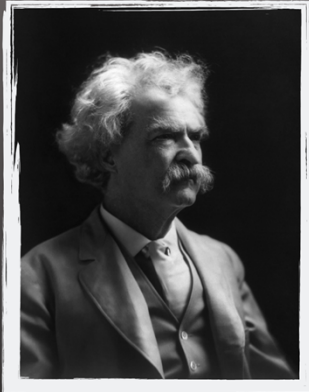
Preserve

Protective Puts

Protective Puts



## Protective Puts



"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

## Protective Puts

### **Reduce Risk**

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

## Protective Puts

Preserve

## Case Study Market Correction

## Protective Puts



## Protective Puts



## Protective Puts



# Protective Puts





# VectorVest

## Situational Investing

3:15 PM – 4:15 PM





## Situational Investing

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

## Situational Investing

### Common Strategies

1. Buy and Hold Stocks in All Markets.
2. "Riding the Wave"
3. Bottom-Fishing for Big Profits.

# Situational Investing

## Buy and Hold Stocks in All Markets

Buy 20 'Ruler Stocks' on 9/13/96,

Hold to 12/5/22.

1,422.46% Total Gain,

Over 54% ARR

Max Drawdown = 42.21%

# Situational Investing



## Situational Investing

### Riding-the-Wave

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

## Situational Investing

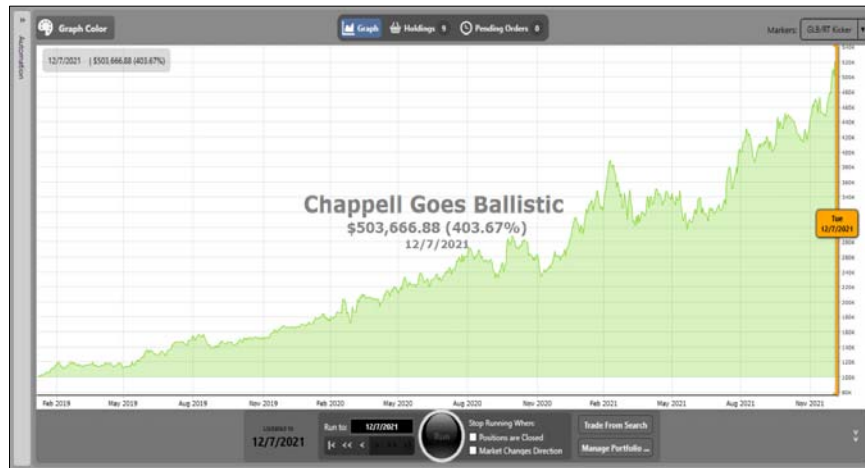
### Riding The Wave

#### **Chappell's Champs & Ballistic New Highs - Short**

1/7/19 to 12/5/22.

Total Gain = 696.94%  
Annualized RR = 178.26%  
Max Drawdown = 26.09%

# Situational Investing



# Situational Investing

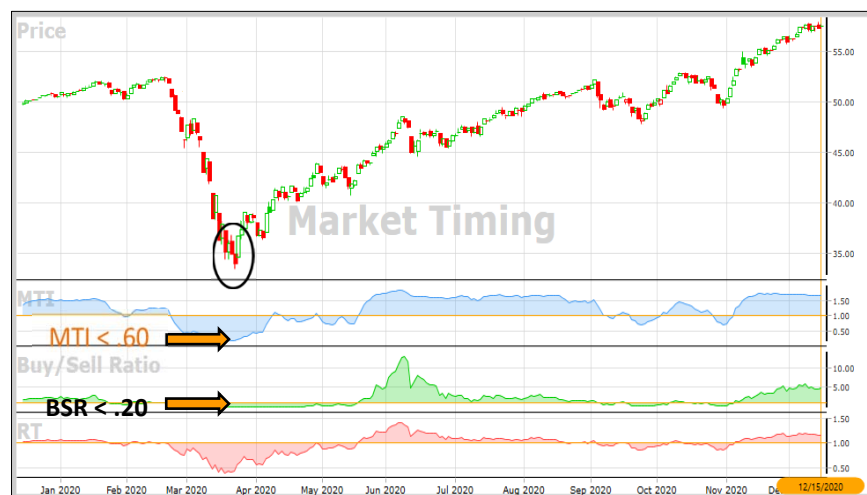
## The Art of Bottom Fishing

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

## Situational Investing

*Effective Bottom-Fishing requires  
precise timing!*

## Situational Investing



## Situational Investing

*Effective Bottom-Fishing also requires  
a paradigm shift in stock selection.*

## Situational Investing

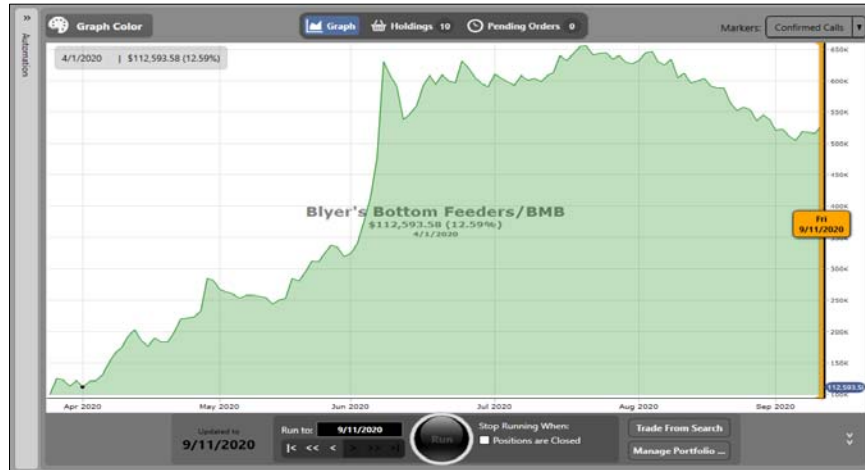
### Bottom Fishing

#### **Blyar's Bottom Feeders/BMB**

Profit Locker Recommended Stop  
Do not trade same stock for 31 days  
3/25/20 to 9/11/20.

Total Gain = 429.87%  
Annualized RR = 923.58%  
Max Drawdown = 23.02%

## Situational Investing



## Situational Investing

### Protecting Profits

Start protecting profits when the MTI goes above 1.5 – 1.7 and the Primary Wave turns down.

## Situational Investing

Read the VectorVest Views and watch the DCGR to gain invaluable insights on market direction from the experts.



# VectorVest

## Break

4:15 PM – 5:00 PM



# VectorVest

## Special Presentation – Swing Trading Psychology

5:00 PM – 6:00 PM



## Swing Trading Psychology

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

-Mike Tyson

## Swing Trading Psychology

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

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

# Swing Trading Psychology

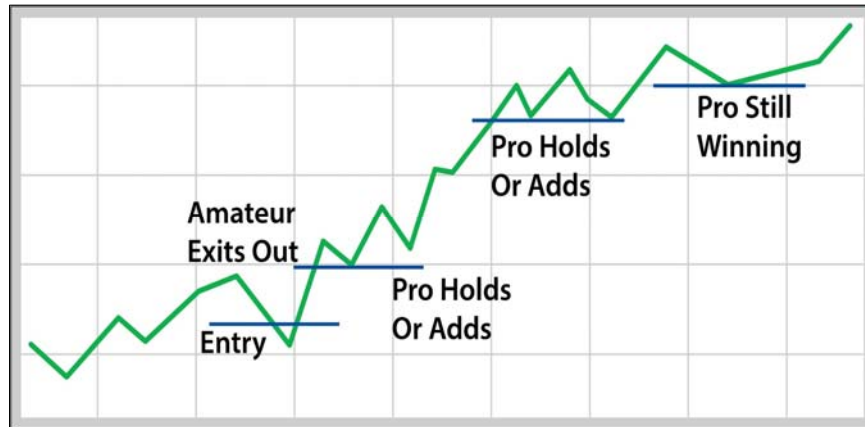
## WHAT I DO

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

## Losing Traders



## Winning Traders



## Swing Trading Psychology

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

Investing is for DY, and trading is to make cash?

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

## Managing Risk

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

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

## What's Needed to Win ?

To make cash in any timeframe we need three things:

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



## Swing Trading Psychology

Is the Apple chart going up or down tomorrow?  
What do you think?

## Swing Trading Psychology

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

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

Heads APPL is going up, tails its going down.

Would you trade like that?

## Swing Trading Psychology

Have you chosen yet?

Why are you frowning?

Would you consider trading like this?

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

## Swing Trading Psychology

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

LET'S CONSIDER A SPECIAL GAME

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

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

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

## Swing Trading Psychology

Would you play that game?

## Swing Trading Psychology

### **IT'S A GREAT GAME TO PLAY.**

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

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

## Swing Trading Psychology

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

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

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

## Swing Trading Psychology

MOST TRADERS ONLY THINK ABOUT HIT RATE.

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

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

## Characteristics of a Winning Method

### **WHATS THE EXPECTENCY OF THE FOLLOWING SYSTEM:**

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

Right makes 10 points

Wrong loses 90 points

## Swing Trading Psychology

The expectancy is the trading system is...

$$(9 \times 10) - (1 \times 90) = 0$$

AFTER all that work the system breaks even.

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

## Swing Trading Psychology

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

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

## Swing Trading Psychology

System expectancy is a function of:

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

## Swing Trading Psychology

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

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

Risk is \$17 the target is \$34

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

That's what this day is all about.

## Apple 2 to 1 risk/reward trade...



## Swing Trading Psychology

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

Every trade has two decisions associated with it :

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

## Swing Trading Psychology

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

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

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

THE CONCEPT IS CALLED POSITION SIZING.



## Swing Trading Psychology

PROBABILITY OF A BAD CALL =  $1/2$

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

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

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

## Swing Trading Psychology

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

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

## Swing Trading Psychology

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

## Swing Trading Psychology

### **FIRST DECISION OF THE DAY**

HOW MUCH IS IN YOUR ACCOUNT?

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

## Swing Trading Psychology

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

## Swing Trading Psychology

If you don't know how much money in in your account,  
then you cannot size your position correctly.  
If you do not size your position correctly then you are  
gambling and NOT trading.

## Swing Trading Psychology

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

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

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

## Swing Trading Psychology

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

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

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

## Swing Trading Psychology

$N * \text{Risk/share (dollars)} = 1\% \text{Account size}$

(I will do a calculation of this in the seminar)

Where N is the number of shares to be bought

Risk/share is the \$ amount by subtracting the entry point from the stop loss level

Account Size is agreed upon at the outset of the trading business

## Swing Trading Psychology

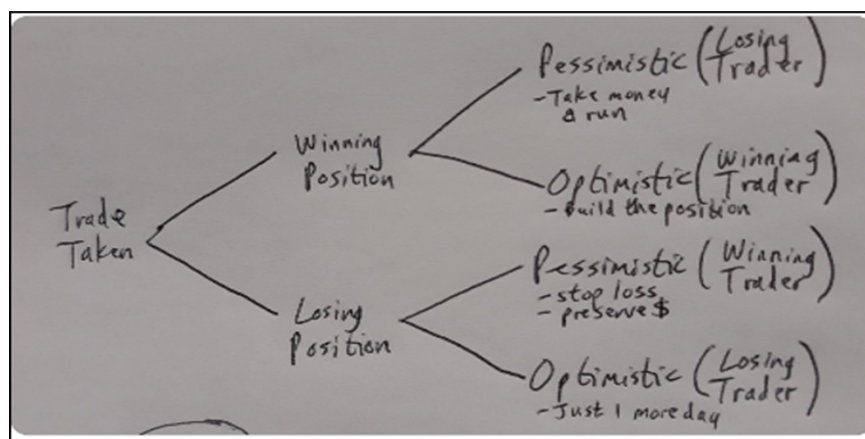
Two Objectives:

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

## Swing Trading Psychology

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

## Swing Trading Psychology



# VectorVest

## Important Numbers

### Customer Service

Telephone: 0-800-014-8974

Email: [support@vectorvest.com](mailto:support@vectorvest.com)

Managing Director, United Kingdom:

Dr. David Paul

[David.paul@vectorvest.com](mailto:David.paul@vectorvest.com)





# VectorVest

## VectorVest Two-Day Investment Seminar

End of Day One



# VectorVest

## VectorVest Two-Day Investment Seminar

Start of Day 2



# *Day Two*

## *Morning Session*



# VectorVest

## The Anatomy of a Swing Trade

9:00 AM – 9:45 AM





## The Anatomy of a Swing Trade

### What I Do:

1. Intraday trading of mostly the SP500index (PM UK time)
2. Swing trades lasting 3-21 days in UK and USA stocks. This is today's subject.
3. Core trades in Stocks lasting 2-6 months
4. A pension stock portfolio focusing on yield

## The Anatomy of a Swing Trade

### What is Needed to Win?

To make cash in any timeframe we need three things

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

# The Anatomy of a Swing Trade

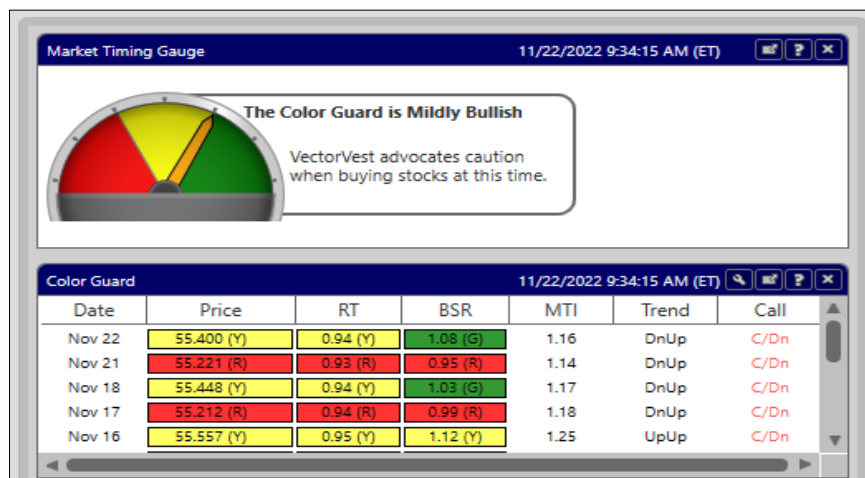
1. The overall market is on your side. You've determined that the market is trending in the same direction you want to swing trade.

VectorVest has totally objective market timing models. These have been studied earlier today.

# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade

1. Primary Wave turns UP i.e., Up/Down
2. Green Light in the price column
3. Black Star in the Green Light
4. DEW turns Up
5. Underlying trend turns Up. Up/Up
6. Underlying trend confirmed C/Up

## The Anatomy of a Swing Trade

### Oversold

MTI  $\leq 0.65$

Buy/Sell ratio  $\leq 0.25$

As I write these B/S  $< 0.2$

### Overbought

MTI  $\geq 1.6$

Buy/Sell ratio  $\geq 4$

## The Anatomy of a Swing Trade

2. The industry group is on your side. Stocks tend to follow their industry groups up or down. If the security's industry group is trending strongly in the same direction you want to swing trade the probabilities of success increase. Simply listen to Glenn on a Thursday.
3. Trade in the very best shares. Shares that have excellent growth characteristics with fair safety of earnings. How to find the best stocks will be fully discussed over the two days together.

## The Anatomy of a Swing Trade



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

## The Anatomy of a Swing Trade

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

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

## The Anatomy of a Swing Trade

Comfort index looks at:

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

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

## The Anatomy of a Swing Trade

SP500 DEW SWINGERS1

Run Search

12/10/2020 9:58 AM Stream OptionsPro

Parameters

	Date/Time	Parameter	Operator	Value
▶	Time of Search	Stock CI - (Comfort Index)	>=	1.2
	Time of Search	Stock AvgVol - (50 day moving A...	>=	200000
*				

## The Anatomy of a Swing Trade

### Three Moving Averages...The Bow Tie...

1. 21 EMA
2. 55 EMA
3. 89 SMA

Where the cross is known on the “floor” as a Bow Tie.



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade

You get very lucky when your long trades have.

1. The overall market behind them.
2. Great growth fundamentals (RV,GRT)
3. In sync with the Bow Tie.

## The Anatomy of a Swing Trade

Sources of Swing Trade opportunities for me.

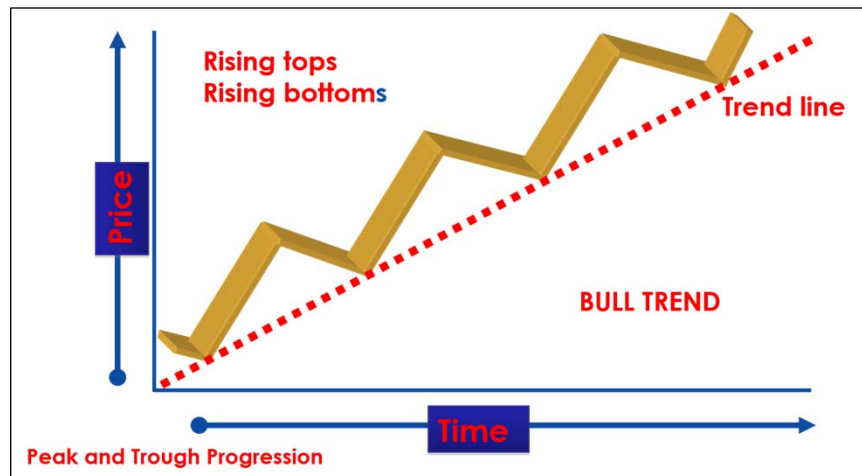
1. DEW SWINGERS UNISEARCH
2. TOP 30 STOCKS BY VST
3. MIDAS TOUCH WATCHLIST
4. EXPLOSIVE EPS STOCKS UNISEARCH

I filter all of these with the Bow Tie visually.

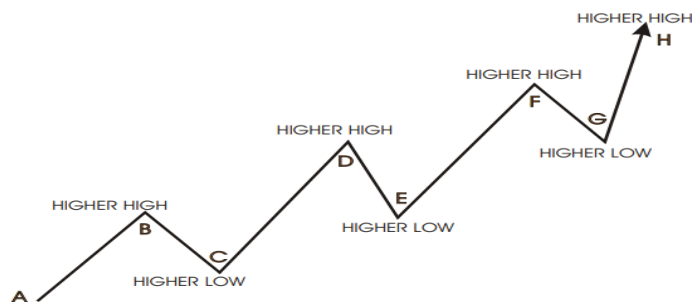
## The Anatomy of a Swing Trade

5. The share should pullback to the last old high most of the time. This pullback should occur on falling volume. That's tomorrow's talk.

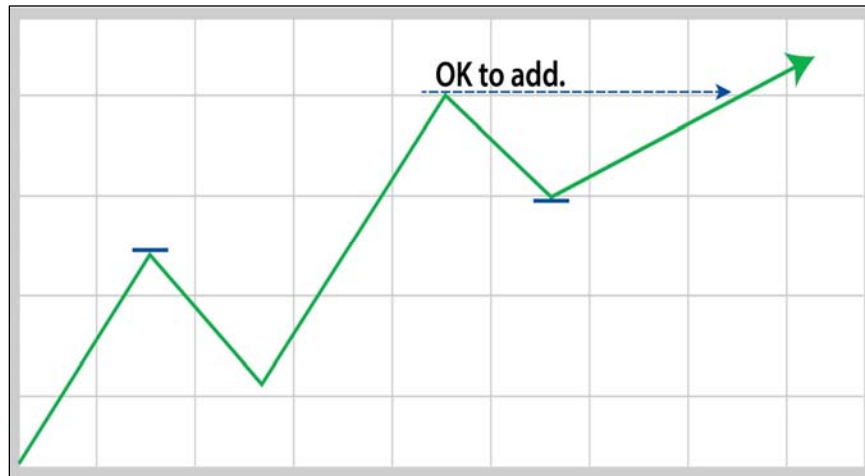
## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade



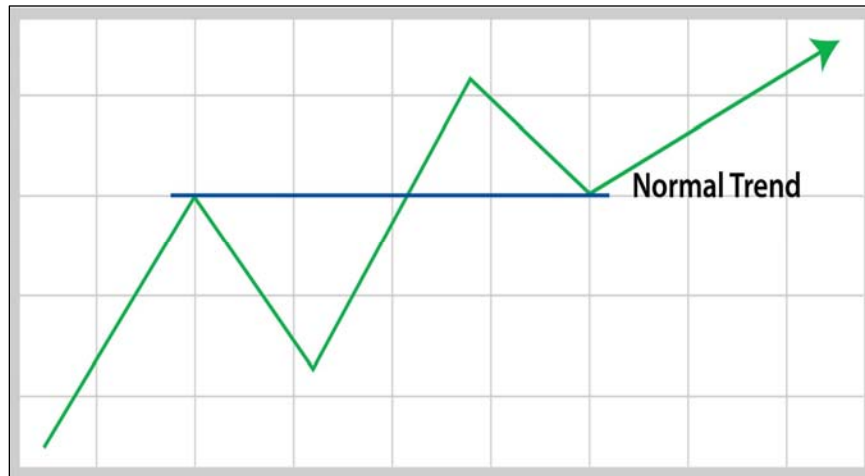
## The Anatomy of a Swing Trade



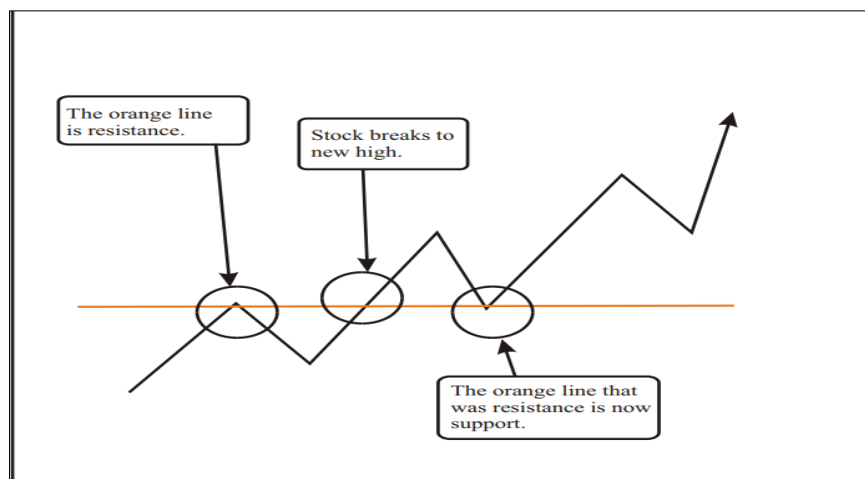
## The Anatomy of a Swing Trade



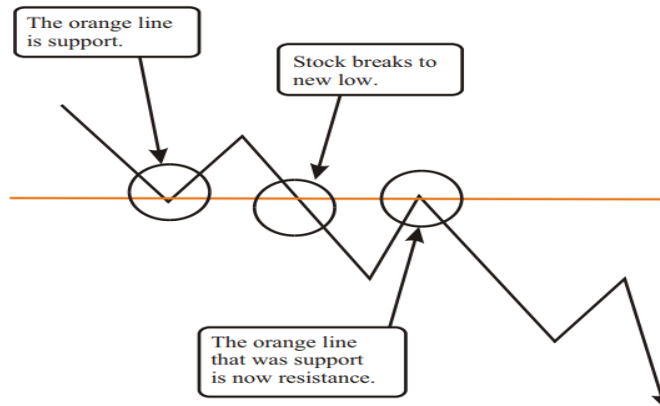
## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade

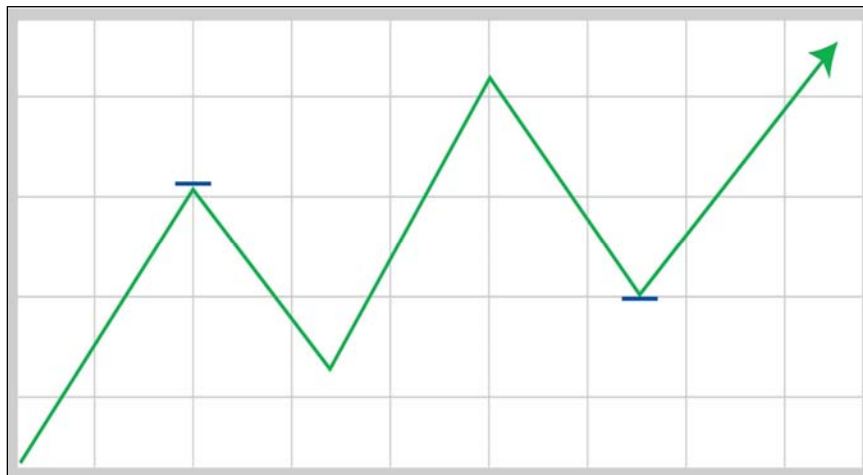




# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



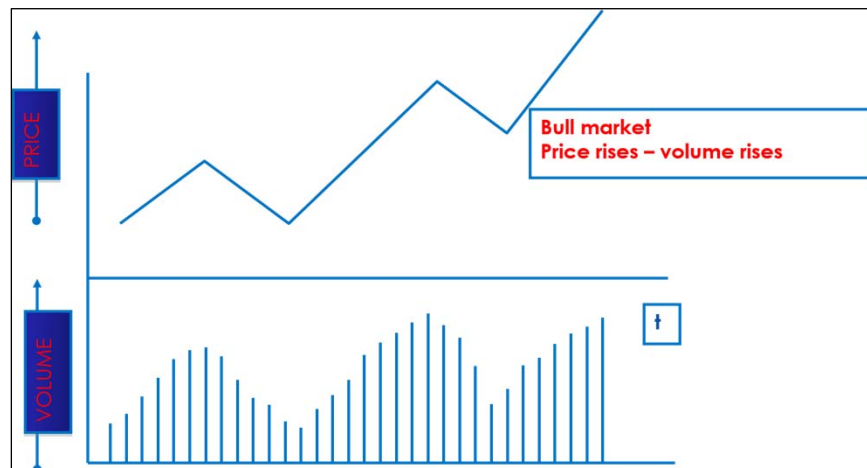
## The Anatomy of a Swing Trade

Volume is Vital to identify the trend with certainty.

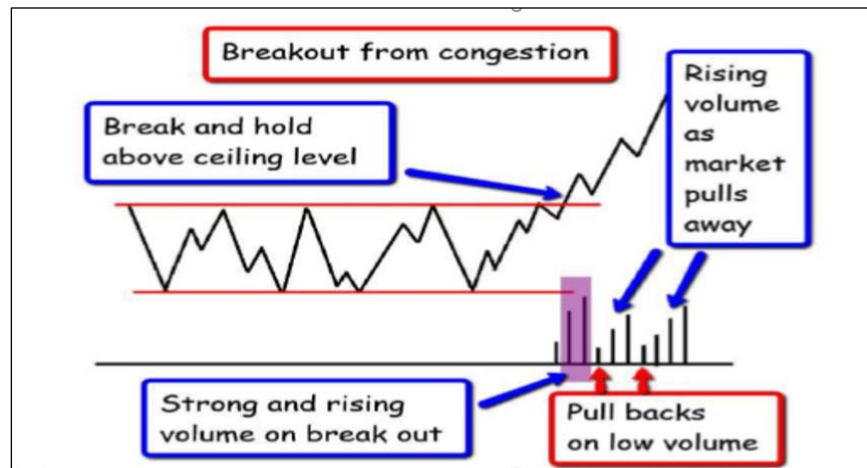
Is this a pullback or a trend change?

In a bull market a stock should advance on increased volume and retrace on lower volume.

## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade



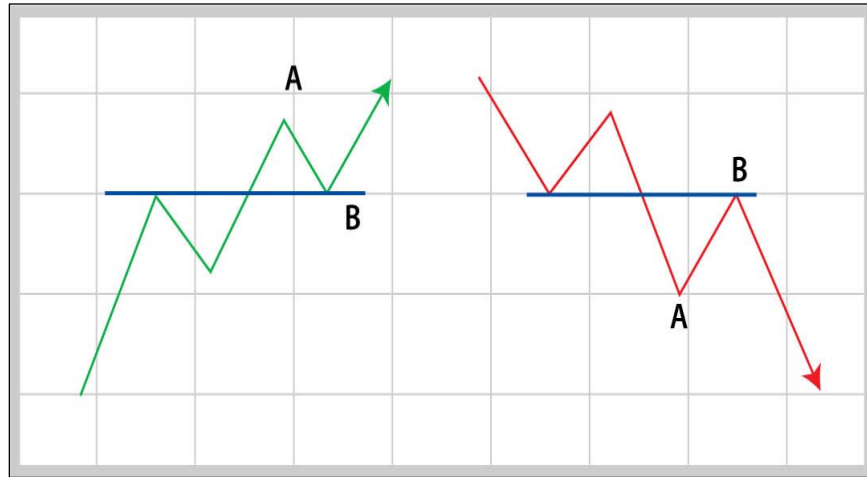
## The Anatomy of a Swing Trade...UK..



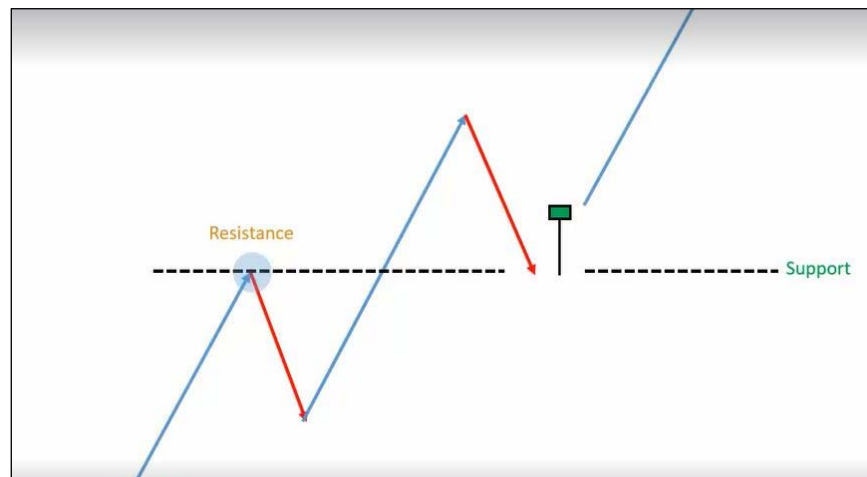
## The Anatomy of a Swing Trade...UK..



## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade



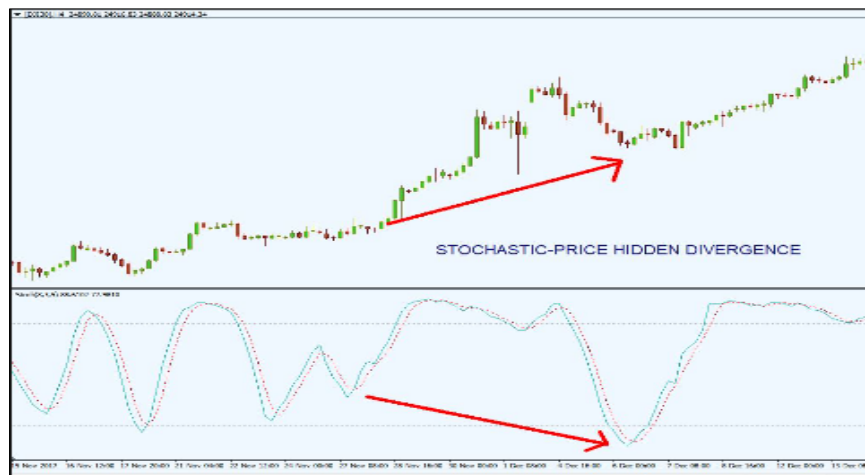
## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade

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

## The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade





# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade

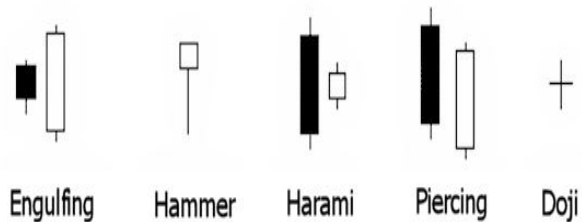


## The Anatomy of a Swing Trade

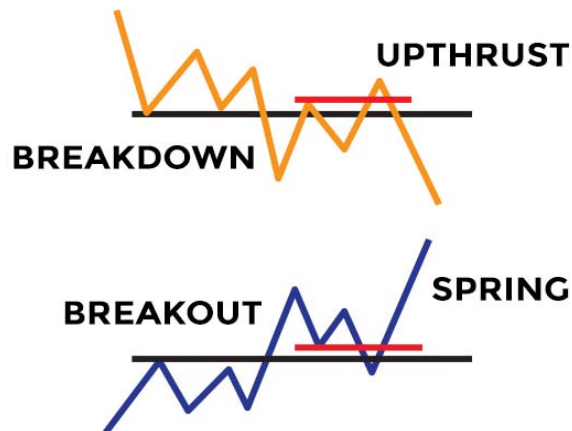
7. Candlestick patterns make excellent entry points. Many traders use a candlestick pattern plus a close above an 8 ema to confirm a reversal.

## The Anatomy of a Swing Trade

Bullish candlestick patterns



## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade

1. Most of my trades use the Wyckoff Spring.
2. Most as in sync with the Bow Tie
3. All have good growth fundamentals.
4. At least the Primary Wave is Up.

## The Anatomy of a Swing Trade

Please note that the fastest momentum trades occur after most of the retail swing traders have been stopped.

The good trade is always the hard trade.

## The Anatomy of a Swing Trade

### My Rules

1. The Good Trade is the hard trade
2. Fade the short-term trend in the direction of the long-term trend.
3. I place my entries where the masses place their stops. That's why the spring setup comes into its own.

# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



# The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade

They are not called “Springs”  
for nothing.

## The Anatomy of a Swing Trade...Longs...

1. Strong fundamentals ( $RV \geq 1$ ) ( $GRT \geq 15$ ) (forecast EPS rising)
2. The overall market is at least showing a Green Light.
3. 21,55 and 89 positive (the area between the 21 and 55 is known as the Zone)...HIGH CI\*RT...
4. Stochastic < 20
5. Price pulls back into or close to the Zone and an old high point (Normal Trend)...The best entries are on a 2<sup>nd</sup> test (spring). These are 90% of my trades.
6. Stochastic showing reverse divergence with price. (price is making a higher low but the stochastic is making a lower low)

## The Anatomy of a Swing Trade...Longs...

7. A breakout of the down sloping trendline can define a great entry point.
8. Place a Buy Stop above the high of the breakout bar and a stop loss at the previous low. 9. The VectorVest stop will be wider and help with spikes which occur only too often. Size the position so as if it fails no more than 1% of the capital is lost.

## The Anatomy of a Swing Trade...Longs...

9. A candle pattern can be a good entry. I use three or 4 only. Morning star, Outside bar. Inside bar and a Hammer.
10. I recommend taking partial profits as the trade moves your way. Exit  $\frac{1}{2}$  when you have made as much as you have risked or at the last high which ever come first. Stop to entry.
11. Let the remaining run and use the VV stop as a trailing stop



## The Anatomy of a Swing Trade

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

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

## The Anatomy of a Swing Trade

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

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

Let  $N$  = Number of shares bought

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

## The Anatomy of a Swing Trade

### 10. Managing the trade.

To start split your position into two parts.

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

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

## The Anatomy of a Swing Trade

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

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

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

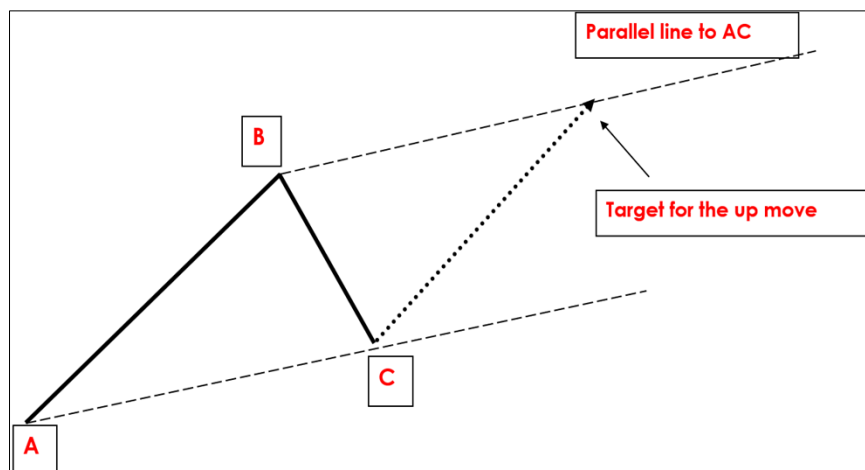
## The Anatomy of a Swing Trade

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

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

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

## The Anatomy of a Swing Trade



## The Anatomy of a Swing Trade

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

- Mike Tyson

# VectorVest

## Top Techniques for Trending/Channeling Markets

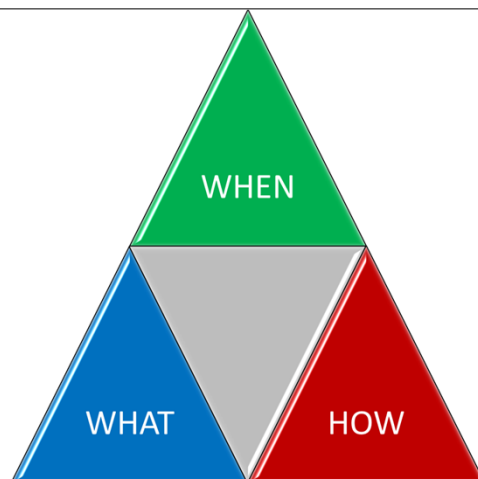
9:45 AM – 10:45 AM



## Trending Markets Description

There are 3 areas swing traders need to focus on to be successful

## 3 Key Areas



# Trending Markets Description

Up Trend: A series of higher highs and higher lows

- $MTI > 1$ , Up sloping Moving Averages

Down Trend: A series of lower lows and lower highs

- $MTI < 1$ , Down sloping Moving Averages

# Trend Analysis





# Up Trend



# Down Trend



## Neutral Market Description

- Prices moving sideways
- Prices are “range-bound,” staying in a horizontal channel

## Neutral Market



## Trending Indicators

### Indicators for Trending Markets

## Moving Averages

The Moving Average (MA) is a simple technical analysis tool that smooths out price data by creating a constantly updated average price. The average price is taken over a specific period-of-time, like 10 days, 20 minutes, 30 weeks or any time period the trader chooses.

## Moving Averages

Moving Averages are used to establish insight into future real price direction.

## Moving Averages

### Major Types of Moving Averages

- Simple Moving Average (SMA)
- Exponential Moving Average (EMA)
- Weighted Moving Average (WMA)

## Moving Averages

### Simple Moving Average

Arithmetic Average:

- Sum the prices (e.g., close) for each day in the look back window
- Divide sum by the number of days in the look back window

## Moving Averages

### Exponential Moving Average

Arithmetic Average:

- The EMA assigns one weight (between 0 and 1) to today's price and the complement of that weight to yesterday's EMA
- The smoothing weight value is calculated based upon the number of days

## Moving Averages

### Weighted Moving Average

#### Arithmetic Average:

- WMA assigns different weights to the prices in the look back window
  - Most recent prices are considered most important
  - Largest weights assigned to most recent prices

## Moving Average Crossovers

#### Description:

- Classic technical analysis technique
- Finds stocks where the short-term moving average has crossed the long-term moving average (upside or downside)
- Can require both moving averages to be moving in the same direction
  - Only recommended for lengths  $\leq 20$  days

## Moving Average Crossovers

### Interpretation:

- Bullish signal – fast (short-term) moving average crosses from below to above the slow (long-term) moving average
- Bearish signal – fast (short-term) moving average crosses from above to below the slow (long-term) moving average

## Sensitivity of Moving Averages

Type of Moving Average	Sensitivity
Simple	Least
Exponential	Medium
Weighted	Most

## Powerful Moving Average Crossovers

### Short-term parameters for stocks:

- Moving average crossover: 3 & 8-day
- Moving average crossover: 1 & 20-day

“Acid Test” for stocks: 10 & 30-week

## Acid Test





## MACD

### Description:

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

## MACD

### Interpretation:

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

## MACD (Daily)



## MACD (Weekly)



## Neutral Indicators

### Indicators for Neutral Markets

## Support and Resistance

- Price movements occur as a series of peaks and valleys
- Price peaks (highs) represent resistance
- Price valleys (lows) represent support

## Support and Resistance

Support – the price area under the market where buying pressure overcomes or equals selling pressure

- Price decline is stopped (Floor)
- Prices begin to rise or move sideways

## Support and Resistance

Resistance – the price area over the market where selling pressure overcomes or equals buying pressure

- Price advance is stopped (Ceiling)
- Prices begin to fall or move sideways

## Support and Resistance

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

## Support and Resistance

- What had been resistance becomes support.
- What had been support becomes resistance.
- Zones are created by breakouts and retests
  - Breakout = Upside or downside movement from a price range or price pattern
  - Retest = Movement toward a breakout area

## S/R (Daily)



## S/R (Weekly)



## Stochastics Oscillator

### Description:

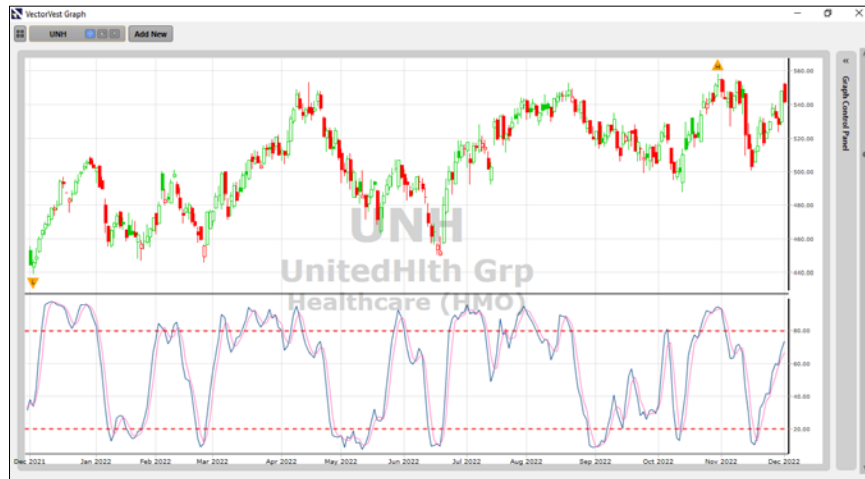
- Developed by George Lane
- Compares the closing price to the range (high – low) over a specified look back period (n)
- Close near high = strength
- Close near low = weakness
- Combines two elements: Moving averages and relative strength
- Calculations – very tedious

## Stochastics Oscillator

### Interpretation:

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

## Stochastics (Daily)





# VectorVest

## Break

10:45 AM – 11:00 AM



# VectorVest

## The Near Perfect Indicator

11:00 AM – 12:00 PM



Many Traders and Investors struggle at times with knowing when to enter a trade and when to exit.

Recently, we discovered that by placing two specific moving averages on VectorVest's proprietary Relative Timing and STOP indicators, we created something very special. We called The Near Perfect Indicator or NPI.

The NPI removes the uncertainty from your trading and replaces it with a systematic, easy way to follow rules for better, more consistent entries and exits.

The Near Perfect Indicator is based on repeating Stock Price Cycle Waves.

Like the tides of the ocean, the market and a stock's price move in recognizable, repeatable wave patterns.

These waves have a rhythmic pattern that can be used to predict Price up trends, down trends, sideways moves, and velocity or momentum.

So, what does this look like?

Price Cycle Waves occur when the Price *expands*, becomes extended, reaches a Peak, and then *contracts* closer to its mean average or below, into a Trough.

The 40 MA of RT reveals the Stock Price Cycle Waves.



**Buy Low** – Aggressive investors confidently look for attractive buying opportunities when the stock price has pulled back or is battered.

**Strong Buy** – Prudent investors wait for Prices to expand with momentum after a pullback, the start of a likely strong uptrend.

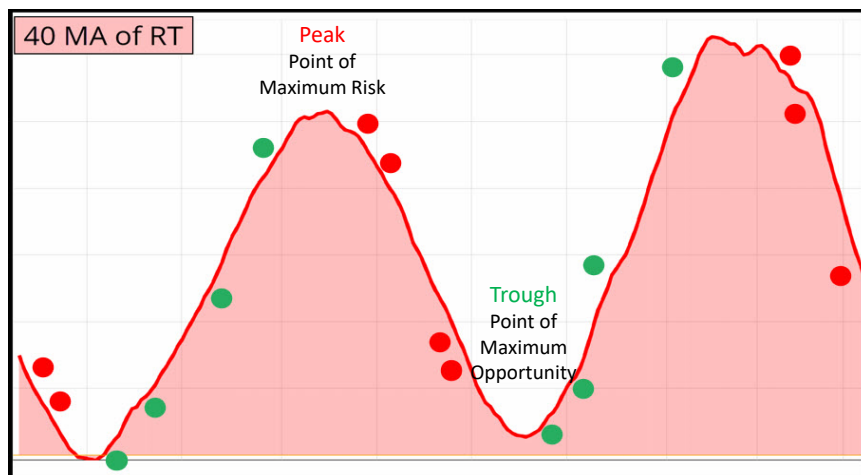
**Mid Buy** – Early in the trend, prudent investors will buy or add shares on pullbacks.

**Sell High** – Disciplined investors avoid buying near market Peaks and begin taking profits to limit exposure and raise cash to buy stocks closer to the Trough.

**Take Profits** – Risk management is a priority when the Price Cycle has Peaked, and the Contraction phase begins.

**Late Sell** – Emotional investors, don't have proper sell rules, so they sell too late after the Price has already declined sharply and is close to the bottom or Trough.

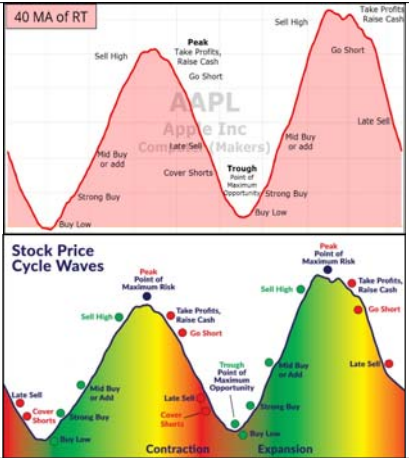
## Which Stock Is It?



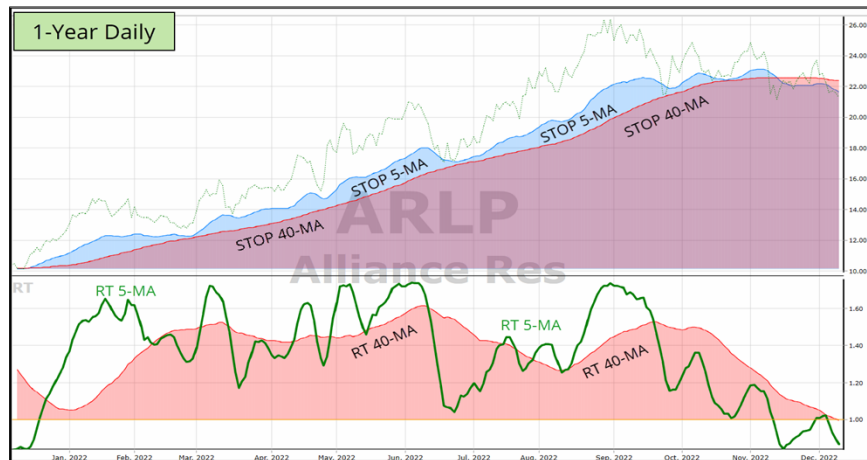
# It's Apple!

Hundreds of stocks display a similar wave patterns every single day. We chose AAPL as the template.

The 40 Moving Average of RT consistently reveals the Stock Price Cycle Waves.



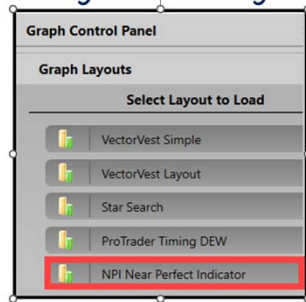
## The RT and STOP-Price 5 and 40 moving averages track the Stock Price Cycle Waves



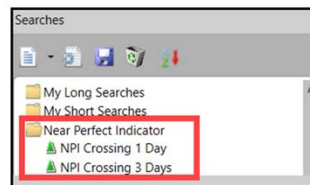
To make it simple, VectorVest has added  
NPI Graph Layout and Searches

## New for the NPI

Ready-to-use Layout

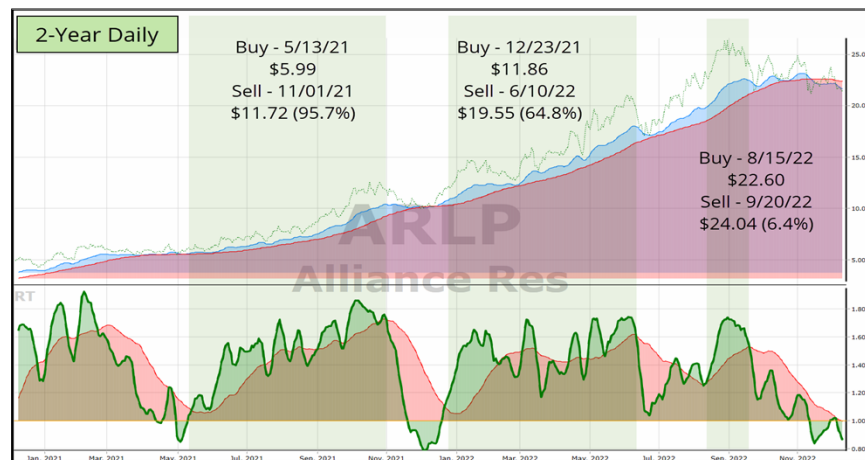


Two Pre-built Searches\*



\*Searches require  
ProTrader Plug-in.

To make it simple, VectorVest has  
added the NPI to your Graph Layouts





## A Question

When you think about your most  
successful trades.  
What is the #1 reason why you made  
money?

## The #1 Reason

**You Got In Early!**

## The #1 Reason

By the time everything is confirmed, the trend is near or possibly at the Peak of the Stock Price Cycle Wave.

Your margin of safety is decreased.  
Successful traders are already taking profits.

**Remember:** The Trend is your Friend until it ends.  
The Moral of the Story: Only take trades Early in a New Trend.

## The Big Question:

How do you know WHEN  
to get in early?

Answer:

## The NPI and Stock Price Cycle Waves

Early alerts with the NPI let you  
enter with a Margin of Safety



Favor Buying Stocks when RT 5-MA is rising from a Trough



The NPI is effective wherever you trade.



It is riskier to buy when the STOP 40-MA is high on a downward slope



Remember The  
Stock Price Cycle Waves



## Are you a Swing Trader or Long-Term Investor?

By combining the 5 and 40 moving averages of RT and the STOP-Price, Swing Traders *and* Investors get a reliable early signal to enter a trade.

**Swing Traders** can choose to exit early when the RT 40 MA is near a peak, flattening out or sloping down, or when the 5/40 MAs have crossed.

**Investors** can hold longer when the 5 MA of STOP remains above the 40 MA and the slope of the 40 MA is moving higher toward 2 o'clock.

Relative Timing, RT is the ultimate weapon for Swing Traders and Investors. The NPI uses the 5 and 40 MAs of RT to reveal the Stock Price Cycle Waves.

## RT is the Key

RT has all the characteristics of a guided missile system. It is computed from the analysis of the direction, magnitude, and dynamics of a stock's price movements day-over-day, week-over-week, quarter-over-quarter, and year-over-year.

The 5 and 40 MAs of RT smooth out the Price Waves, allowing traders to recognize the ebb and flow of the Price trends. Traders can enter positions near the bottoms of Price Waves and exit near the tops.

## The Stop-Price is the Investor's Edge.

VectorVest publishes a Stop-Price for each stock based upon its moving average, adjusted for the stock's fundamentals. On its own, the STOP-Price delivers a "S" or Sell rating that should never be ignored.

The NPI double-smooths the Stop-Price with the 5 and 40 moving averages. When the 5-MA remains above the 40, and the slope of the 40 is toward 2 o'clock, long-term investors may confidently stay longer in a position.

When the STOP 5-MA is below the 40, and the 40 is sloping down toward 4 o'clock, investors should not buy a new position and protect an existing position.

## Even Weekly Investors can benefit by getting in early in NPI Troughs



## Managing Risk Using Parallel Portfolios

“By running parallel portfolios, the monitoring becomes much easier than looking at charts every day.”

– Jesse Loxton, Australia

## Setting up your Parallel Portfolios

1. Create a new portfolio for your long NPI stocks called NPI Account Portfolio.
2. Create a “short” search and Custom Portfolio of NPI EMA Squeeze down  $5\text{-EMA} < 13\text{EMA}$ , using a Stock Portfolio filter for the NPI Account Portfolio.



## Setting up your Parallel Portfolios

Parameters				
	Date/Time	Parameter	Operator	Value
	Time of Search	Stock Price - (Split Adjust...	EMA	EMA(5) is currently below EMA(13) and has been for the past 1 days
	Time of Search	Stock REC - (Recommend...	<>	Buy
	Time of Search	Stock RT - (Relative Timin...	<	3 days ago Stock RT
	Time of Search	Stock Price - (Actual)	>	1
	Time of Search	Stock Portfolio	=	NPI Account Portfolio
		Stocks		Capital Appreciation
		Industries		Dividend Analysis
		Sectors		Price/Volume
				Sales/Market Capital
				Filter By
				VectorVest Fields
				My Custom Fields
				Exchange
				Industry Group
				Sector
				Portfolio
				Watchlist
				Stock

## Setting up your Parallel Portfolios

3. Go to Tools - Application Settings – Alerts. Set Alerts to go to your computer or phone.

## Setting up your Parallel Portfolios

General Graph Portfolio Derby Alerts BackTester Trading

Email Alerts Edit Delete

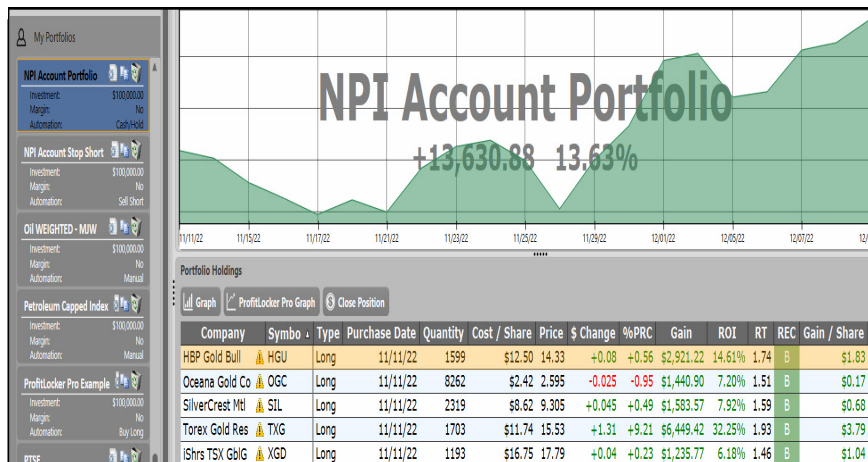
Destination	Portfolio/Order	Portfolio Summary	RoboTrader	RoboTrader Summary	Watchdog
stan.heller@vectorvest.ca	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

VectorVest 7 Application Alerts

- ☒ Show Portfolio/Order Alerts in VectorVest 7
- ☒ Show RoboTrader Alerts in VectorVest 7
- ☒ Show Watchdog Alerts in VectorVest 7
- ☒ Show Popup on New Alert
- ☒ Show Number of New Alerts in Status Bar

Alert Sound: No Sound

## My Canadian Gold NPI Portfolio



## What Subscribers say about the NPI

Why I love it  
Thanks for your NPI. I have been using it and think it's a game changer.

Joan G. wrote:  
I DO NOT BUY a new stock without viewing the RT 5/40 (Near Perfect Indicator). It has made this difficult market manageable for me and fun.

## The Near Perfect Trading System

We are pleased to announce the inclusion of a brand-new trading system release in our Trading System Viewer called:  
**"The Near Perfect Trading System"**

# The Near Perfect Trading System



# VectorVest

## Leveraging Your Swing Trades

12:00 PM – 12:45 PM



## Options 101

### Why Options?

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

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

## Options Terminology

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

Calls and Puts

Strike

Expiration

Premium

Delta

Moneyness

## Options Terminology

There are two types of options:  
Calls and Puts

## Options Terminology

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

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



# Options Terminology

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

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

# Options Terminology

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

The screenshot displays an options chain for IBM, with the stock price at 161.35. The interface includes tabs for Long Call, Long Put, and Short Put. The main table lists options with columns for Position, Expiration, Strike, Price, Bid, Ask, Vol, OI, IV, Delta, Gamma, Theta, Vega, Rho, and Skewness. The current view shows calls for January 20, 2023, with strikes ranging from 150.00 to 175.00. The selected row is the 160.00 call, which is at a price of 4.15. Below the main table, there are sections for Multiple Expirations and a detailed view of the selected call option, showing its Greeks and other characteristics.

Position	Expiration	Strike	Price	Bid	Ask	Vol	OI	IV	Delta	Gamma	Theta	Vega	Rho	Skewness
Buy 1	Jan 20, 2023	150.00 Call	4.15	0.00	0.00	0	9,990	15.44	0.6199	0.0512	-0.0500	0.1831	0.0909	52.3%
Totals:			4.15	0.00	0.00				0.6199	0.0512	-0.0500	0.1831	0.0909	

## Options Terminology

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

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

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

## Options Terminology

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



## Options Terminology

A good way to remember this.

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

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

## Options Terminology

### Expiration:

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

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

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

## Options Terminology

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

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

## Options Terminology

Premium Price is controlled by a few variables such as:

Volatility

Time to Expiration

Moneyness

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

## Options Terminology

### Delta:

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

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

## Options Terminology

### Delta:

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

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

## Finding the Expiration Sweet Spot

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

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

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

## Options Trading – Case Study

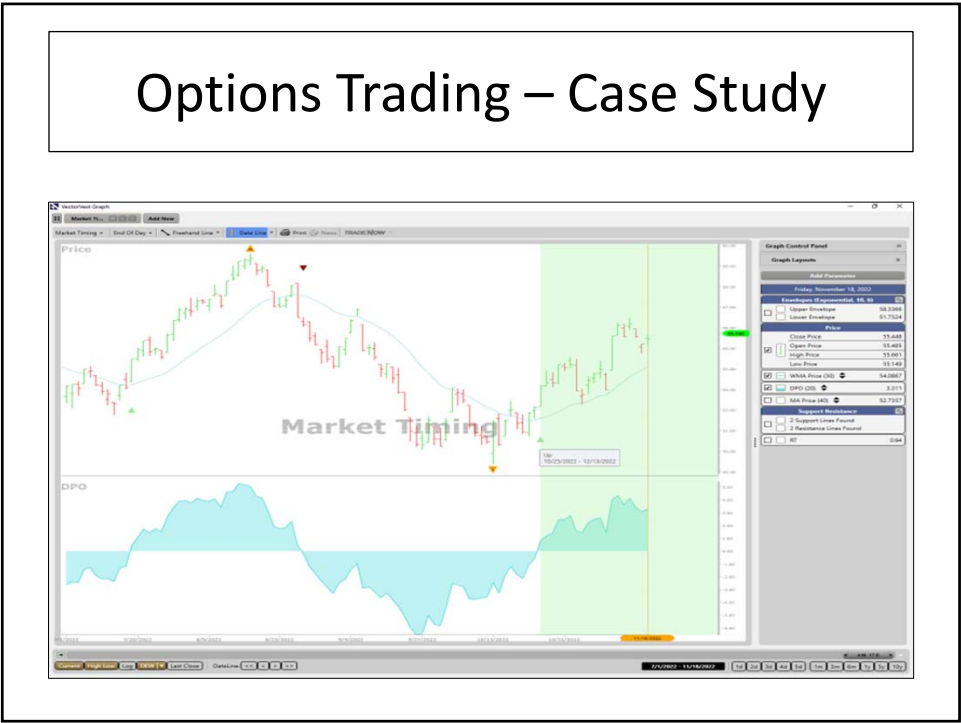
Date: 11/18/2022

Situation: DEW Up

Search: Stochastic – Crossing Above 20

1. Click on the UniSearch tab.
2. Click on Searches – ProTrader, then Stochastics Crossing above 20
3. Run Search on 11/18/2022

## Options Trading – Case Study



## Options Trading – Case Study

# Options Trading – Case Study

## Options Trading – Case Study



## Finding the Sweet Spot

To optimize your capital, choose an option with a Delta range  $> .50 - .60$  that expires the closest to the 21-45 Day Range. This allows you to reduce your trade cost which increases your Rate of Return and is a more efficient use of your capital.

Let's test this idea.



## Options Trading – Case Study



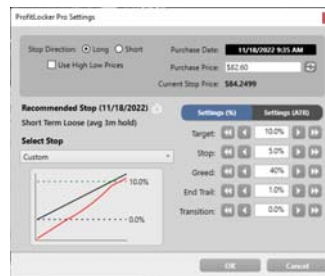
Enter on the Open of 11/18 as we are higher than the prior day's high.

Our Stop is below the low of 11/16

## Options Trading – Case Study

To manage the stop, we will be using the ProfitLocker Pro, set the stop so it matches the price below the 11/16 Low.

The Low is 79.01 and our entry is 82.60, this is approx. 5%.



I tend to use a Greed Factor of Around 40%

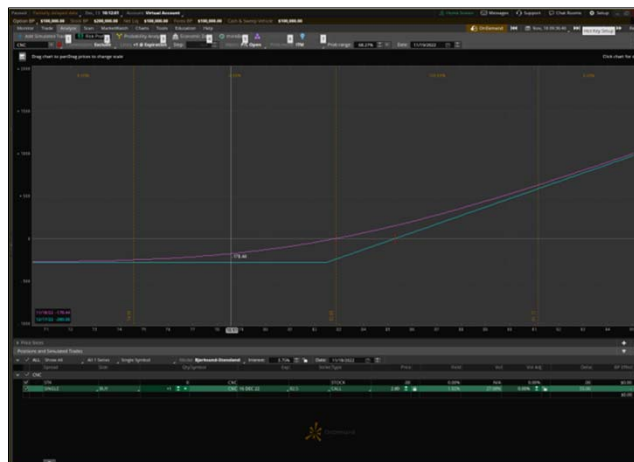
## Options Trading – Case Study

The closest expiration to 21-45 Days is December 16, 2022 at 28 DTE. The closest Delta is the 82.50 Strike at .55.

16 DEC 22	(28)	100							
100.00%	1.00	0	42.60	45.30	16 DEC 22	37.5			
100.00%	1.00	1	40.70	44.60	16 DEC 22	40			
100.00%	1.00	1	38.30	42.00	16 DEC 22	42.5			
100.00%	1.00	0	34.50	38.10	16 DEC 22	45			
100.00%	1.00	0	33.00	37.30	16 DEC 22	47.5			
100.00%	1.00	0	31.20	34.60	16 DEC 22	50			
97.97%	99	0	26.20	29.90	16 DEC 22	55			
100.00%	1.00	0	21.20	24.70	16 DEC 22	60			
100.00%	1.00	17	16.10	18.90	16 DEC 22	65			
98.36%	99	3	13.60	17.50	16 DEC 22	67.5			
100.00%	1.00	16	11.00	13.80	16 DEC 22	70			
100.00%	1.00	7	8.70	11.40	16 DEC 22	72.5			
100.00%	1.00	37	6.70	8.90	16 DEC 22	75			
78.52%	81	117	5.70	6.90	16 DEC 22	77.5			
52.01%	55	143	2.30	3.30	16 DEC 22	82.5			
20.77%	90	1,040	1.90	2.00	16 DEC 22	85			
23.77%	76	993	80	1.05	16 DEC 22	87.5			

## Options Trading – Case Study

To purchase the call we pay \$280.00, our Max Loss using the ProfitLocker Pro stop of \$78.57 is \$178.44. Another advantage of options is your risk is capped at \$280.00.



## Options Trading – Case Study



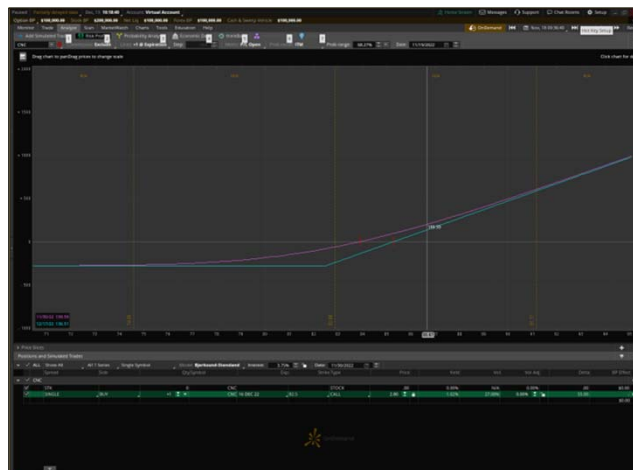
There are numerous ways to manage the trade.

For the single contract trader, exit the trade at the prior high, or simply let ProfitLocker do the work.

On 11/30 we hit the prior high.

## Options Trading – Case Study

If we exit the trade at the prior high (resistance) we profit 199.59 per contract.



## Options Trading – Case Study



For the multi contract trader, exit most of the trade at the prior high and let ProfitLocker set a trailing stop for the rest.

On 12/13 we hit the trailing stop.

## Options Trading – Case Study

Using the 21-45 DTE Option.

Option Cost - \$280.00

Max Loss - \$280.00

Ending Gain - \$199.59

ROI of 71%

## Options Trading – Case Study

Using the Stock (100 Shares).

Stock Cost - \$8256.00

Max Loss - \$8256.00

Ending Gain - \$405

Entered 82.60, Exit 82.65

ROI of 4.9%

## Finding the Sweet Spot

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

Delta range near 50 that expires the closest to  
the 21-45 Day Range.

## Options Trading – Case Study

Date: 11/16/2022

Situation: DEW Down, Primary Wave Down

Search: Breaking Support – 2%

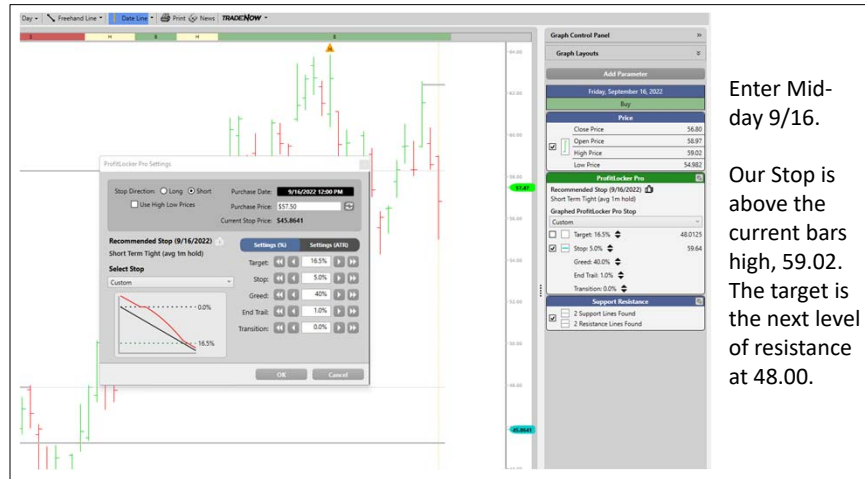
1. Click on the UniSearch tab.
2. Click on Searches – ProTrader, then Breaking Support – 2%
3. Run Search on 09/16/2022

## Options Trading – Case Study



[illegible]

## Options Trading – Case Study



## Options Trading – Case Study

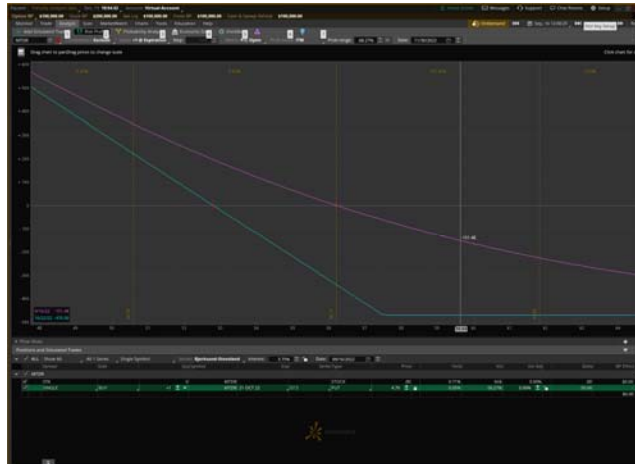
The closest expiration to 21-45 Days is October 21, 2022 at 35 DTE. The closest Delta is the 57.50 Strike at .51.

Exp	Strike	Bid X	Ask X	Prob.ITM	Delta	Open.Int
21 OCT 22	47.5	1.05 X	1.25 X	22.72%	-.17	111
21 OCT 22	50	1.60 A	1.80 X	30.17%	-.24	77
21 OCT 22	52.5	2.25 C	2.55 M	38.54%	-.32	57
21 OCT 22	55	3.30 X	3.60 X	48.17%	-.41	120
21 OCT 22	57.5	4.50 X	4.90 Q	57.63%	-.51	8
21 OCT 22	60	6.00 X	6.40 X	66.30%	-.60	33
21 OCT 22	62.5	7.70 Q	8.20 X	74.39%	-.69	21
21 OCT 22	65	9.40 X	10.20 X	81.46%	-.77	1



## Options Trading – Case Study

To purchase the Put we pay \$4.70, our Max Loss using the ProfitLocker Pro stop of \$59.64 is \$51.48. Your risk is capped at \$470.00.



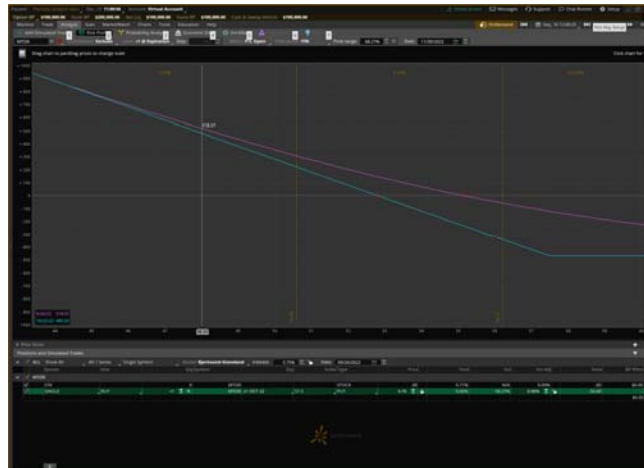
## Options Trading – Case Study



We hit 48.00 on 9/26, exit the trade or as we hit both 48.00 and the stock opened above the Profit Locker Stop.

## Options Trading – Case Study

Our Profit was 518.07 if we exit at 48.00



## Options Trading – Case Study

Using the 21-45 DTE Option.

Option Cost - \$470.00

Max Loss - \$470.00

Ending Gain - \$518.07

ROI of 110%

## Options Trading – Case Study

Using the Stock (100 Shares).

Stock Cost - \$5750.00

Max Loss - \$5750.00

Ending Gain - \$950.00

Entered 57.50, Exit 48.00

ROI of 16%



# VectorVest

## SERVED LUNCH

12:45 PM – 1:45 PM



# *Day Two*

## *Afternoon Session*





# VectorVest

## Options Paycheck Live

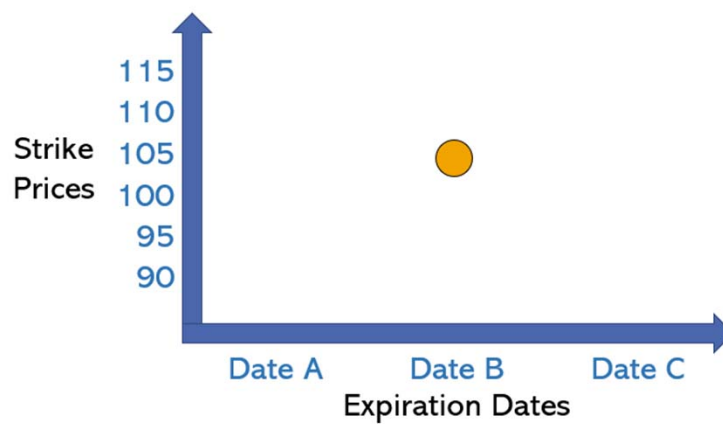
1:45 PM – 2:45 PM



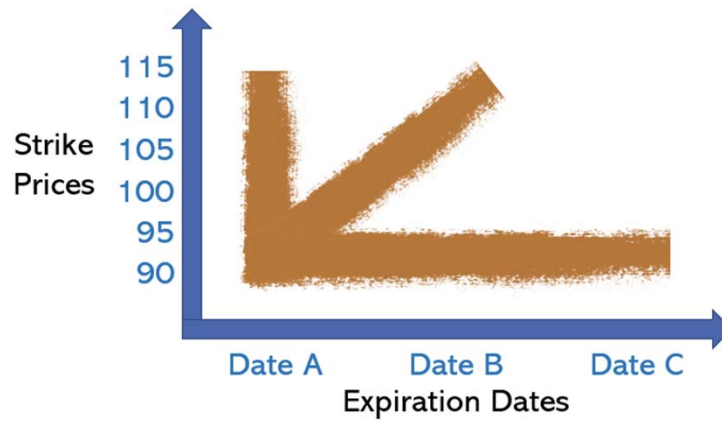
## Options Paycheck Live

What is a Spread?

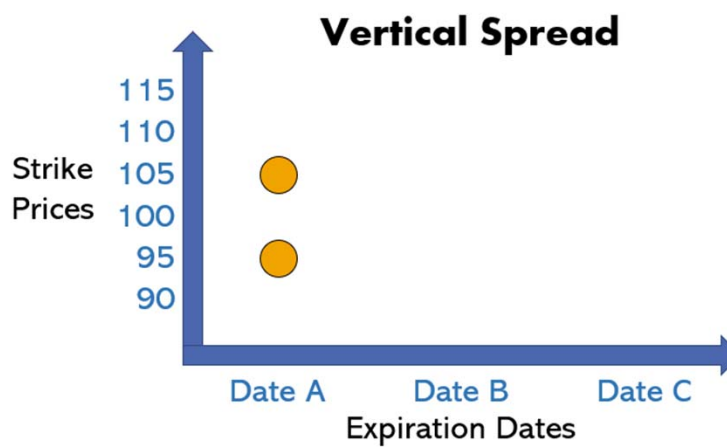
## Options Paycheck Live



## Options Paycheck Live



## Options Paycheck Live

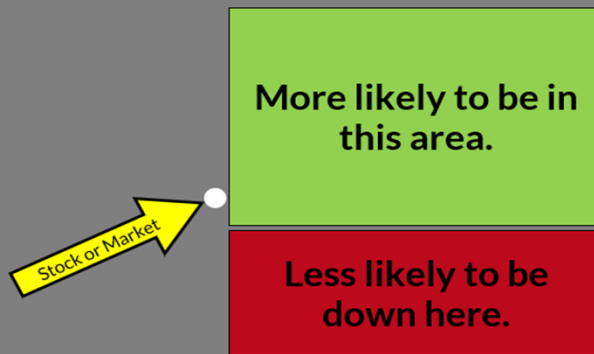


## Options Paycheck Live

### Understanding Probability

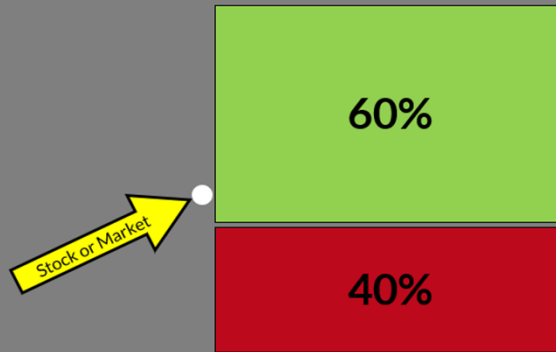
## Options Paycheck Live

### During An Uptrend



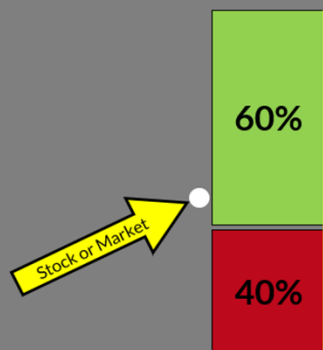
## Options Paycheck Live

### During An Uptrend



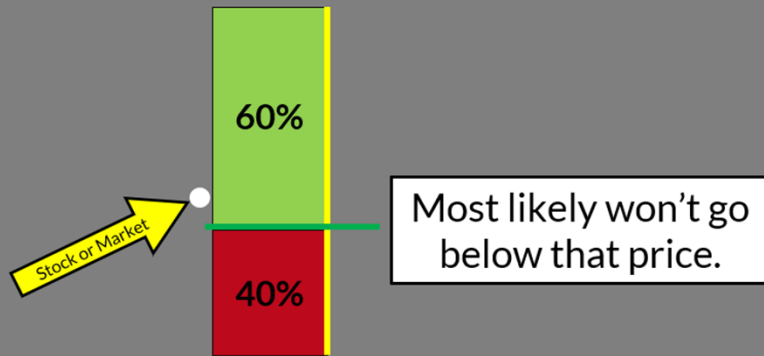
## Options Paycheck Live

### In the next 21-45 days



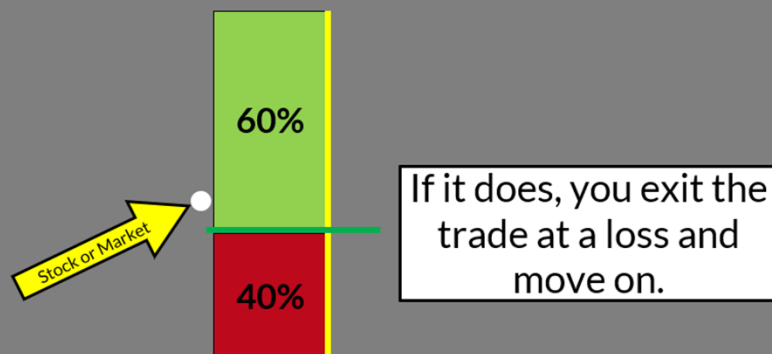
## Options Paycheck Live

In the next 21-45 days

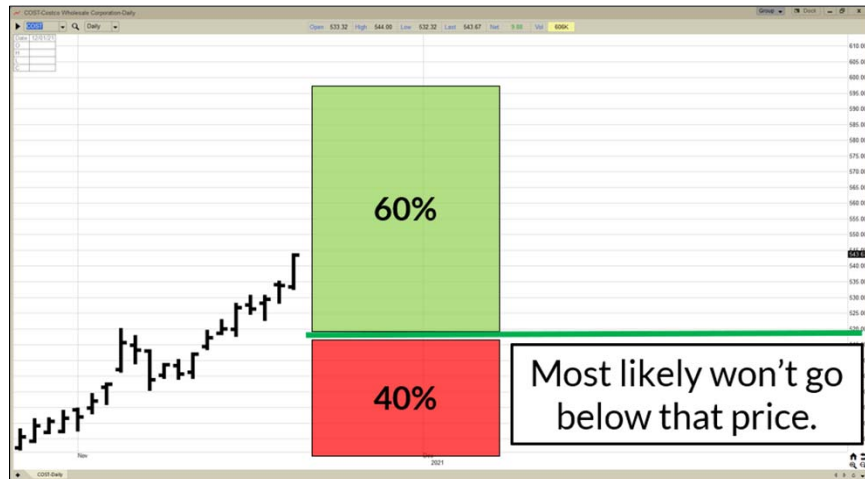


## Options Paycheck Live

In the next 21-45 days



## Options Paycheck Live



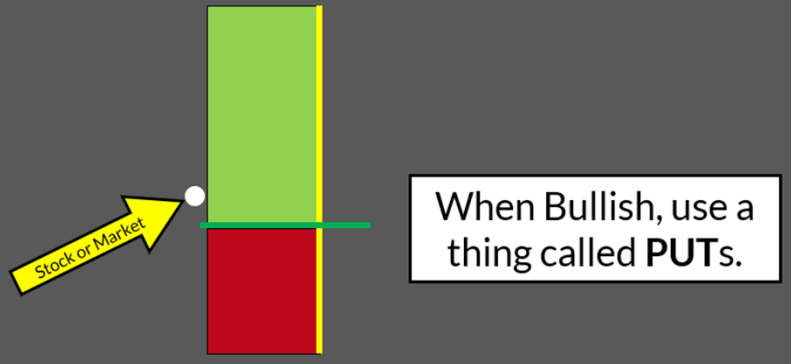
## Options Paycheck Live

Building Blocks of a Spread



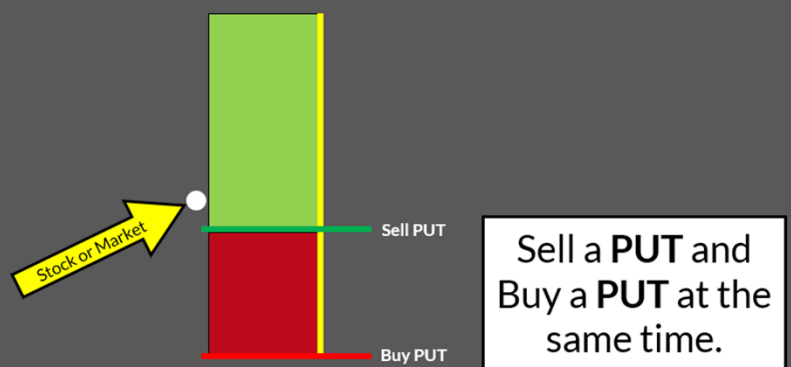
## Options Paycheck Live

### Bullish Trade



## Options Paycheck Live

### Bullish Trade



## Options Paycheck Live

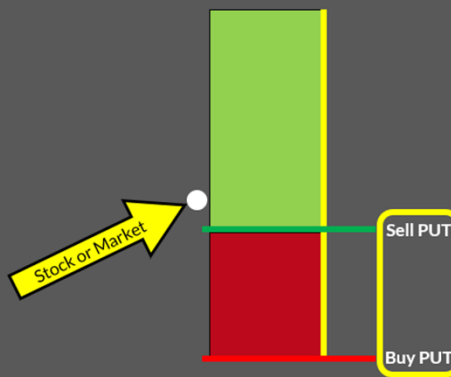
### Bullish Trade



We call this your "insurance" because it protects you. It limits the amount you can lose and makes it a low-risk trade.

## Options Paycheck Live

### Bullish Trade



Both will be on the same order. The newly created spread will have a price & trade similar to a stock.

Bull Put  
Credit Spread

## Options Paycheck Live

### Mechanics of Profits and Losses

## Options Paycheck Live

### Winning Trade

Sell To  
Open  
\$\$

Buy To  
Close  
\$

\$\$ - \$ = \$  
Profit

## Options Paycheck Live

### Winning Trade

Sell To  
Open  
\$250

Buy To  
Close  
\$125

$\$250 - \$125 =$   
\$125  
Profit

## Options Paycheck Live

### Losing Trade

Sell To  
Open  
\$\$

Buy To  
Close  
\$\$\$

$\$ - \$\$ =$   
\$  
Loss

## Options Paycheck Live

### Losing Trade

Sell To  
Open  
**\$250**

Buy To  
Close  
**\$375**

**\$250 - \$375 =**  
**\$125**  
**Loss**

## Options Paycheck Live

2 Rules for Managing Your  
Credit Spreads

## Options Paycheck Live

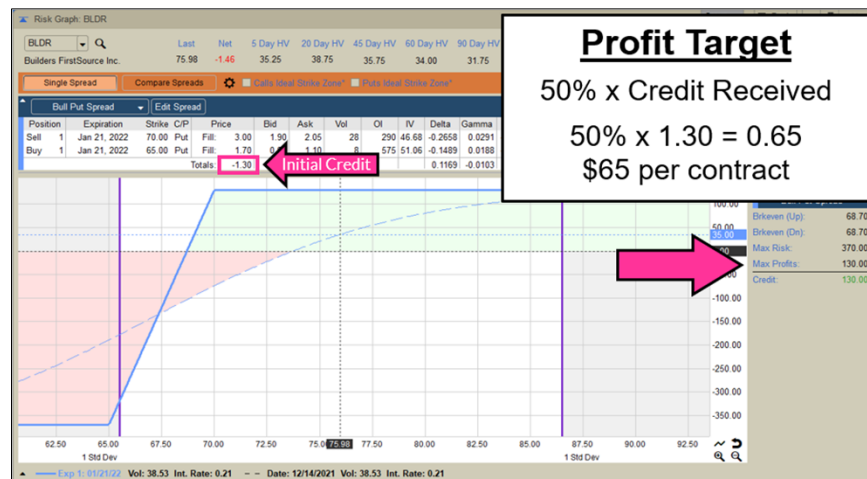
### Case Study

BLDR

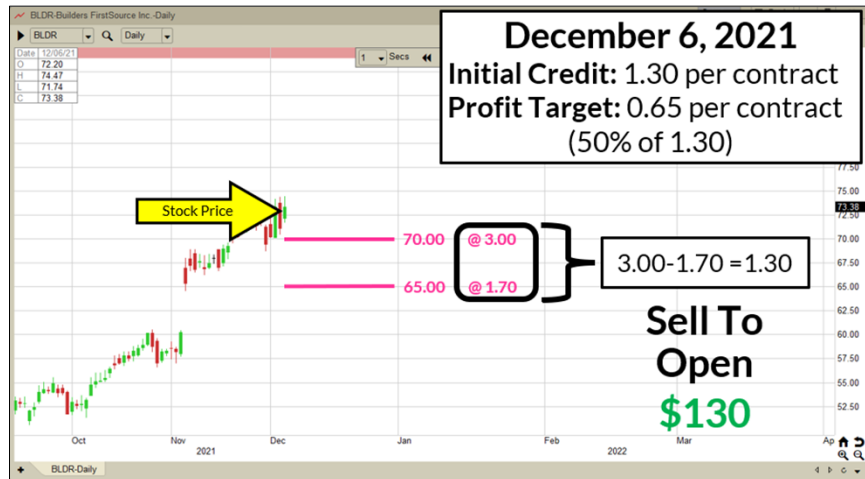
Builders First Source Inc.

Bull Put Spread

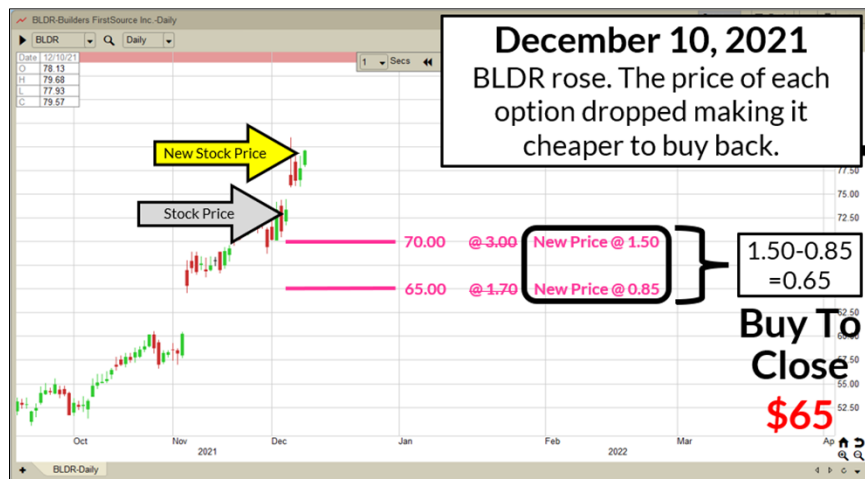
## Options Paycheck Live



## Options Paycheck Live



## Options Paycheck Live



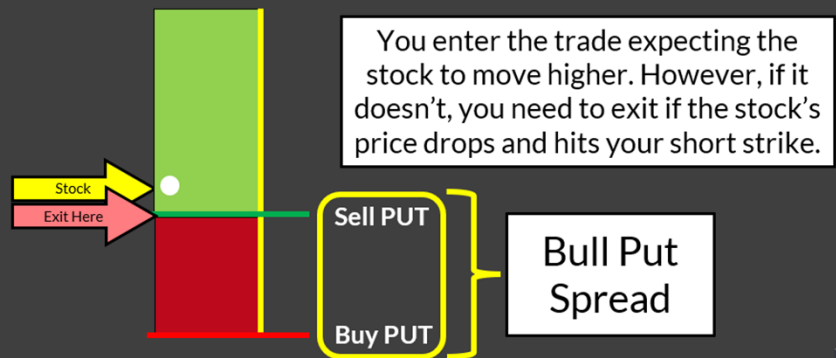
## Options Paycheck Live

Bull Put  
Example

Rule #2  
Stop-Loss

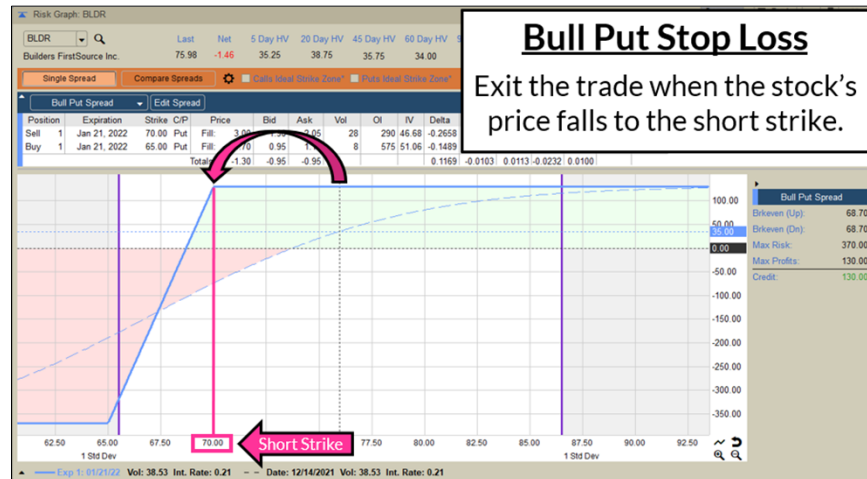
## Options Paycheck Live

### Bullish Trade





# Options Paycheck Live





# *Afternoon Session*



# VectorVest

## The Path to Securing Financial Freedom

2:45 PM – 3:15 PM



## Securing Financial Freedom

### Stay Informed

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

## Securing Financial Freedom

### Heal Your Current Portfolio

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

## Securing Financial Freedom

Follow a VectorVest Trading Plan that best matches your investment style

Successful Investor Approach

The Ultimate Retirement Solution

Precision Swing Trading / Near Perfect Indicator

## Securing Financial Freedom

Automate as much as possible to:

1. Free up time
2. Reduce Stress and Emotion
3. Produce better results



## Securing Financial Freedom

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

## Securing Financial Freedom

**Be an Optimist!**



# VectorVest

## Q&A Speaker Panel

3:15 PM – 3:45 PM



## Mission Statement

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



# VectorVest

## Important Contact Information

Sales: 1-888-658-7638

Seminars: 1-800-231-0110

Product Support: 1-888-658-7638

E-mail: [support@vectorvest.com](mailto:support@vectorvest.com)