

Stock Investing Made Easy
IN SEARCH OF HIDDEN GEMS

Stock Investing Made Easy

In Search of Hidden Gems



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Dori Raser, Golden West and Rocky Mountain Chapters
Barry Detloff, Northern Lights Chapter



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Stock Investing Made Easy

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Stock Investing Made Easy

In Search of Hidden Gems



Dan Harter
North Florida Chapter



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Stock Investing Made Easy

Overview

- Explore online tools to assist with research and judgments
- Explore:
 - Member Sentiment
 - Analyst Estimates
 - Earnings Call Transcripts



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IN SEARCH OF HIDDEN GEMS

Stock Investing Made Easy

Accessing Online Tools

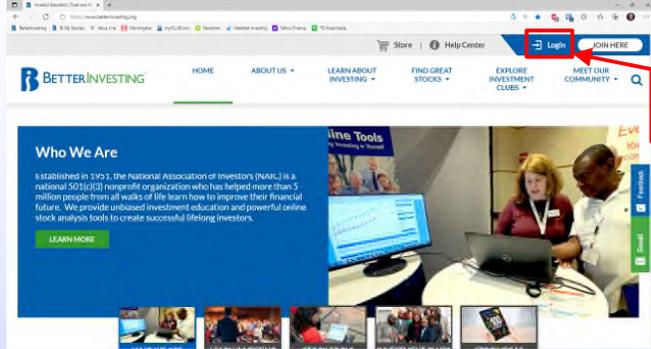
- www.betterinvesting.org or
- Go straight to online tools, ssg.betterinvesting.org

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Accessing Online Tools



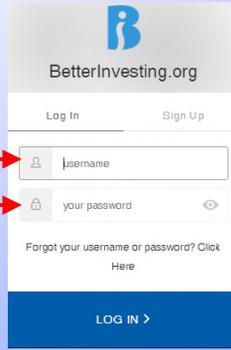
Click Login

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Accessing Online Tools



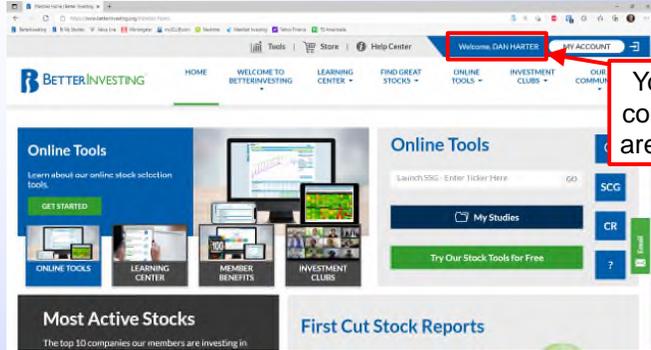
Enter username and password

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Accessing Online Tools



Your name confirms you are logged in

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IN SEARCH OF HIDDEN GEMS

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Accessing Online Tools

Select My Studies

STOCK MADE EASY INVESTING

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Member Sentiment

- What is it?
Compilation of studies by other BetterInvesting members
- How to use it?
Use average judgments as a reality check on your judgments

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Member Sentiment

Move mouse over Research then BetterInvesting

STOCK MADE EASY INVESTING

Note: Must open a stock study to see top menu

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Member Sentiment

Click Member Sentiment

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Member Sentiment

Click check box next to "Sel"

Number of studies completed in past 90 days

Average of all judgments

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Member Sentiment Results

	Sales %	EPS %	High Price	Low Price
Monster	9.90	10.30	162.47	64.55

- Use as support when selecting Sales, EPS, and Price projections

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Analyst Estimates

- What is it?
Average of analyst estimates of future EPS growth projections for a company
- How to use it?
Use as support for your EPS projections

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Analyst Estimates – CNN Money

Click CNN Money Analyst Estimates

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Analyst Estimates – CNN Money

Click Quote

Growth & Valuation

Earnings growth (next 5 years) **+13.30%**

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Analyst Estimates – Seeking Alpha

Click Seeking Alpha Estimates

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Analyst Estimates – Seeking Alpha

Click Growth

EPS FWD Long Term Growth (3-5Y CAGR) 11.81%

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Analyst Estimates – Yahoo

Click Yahoo Analyst Estimates

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Analyst Estimates – Yahoo

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Analyst Estimates – Zacks

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Analyst Estimates – Zacks

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Analyst Estimates Results

	CNN Money	Seeking Alpha	Yahoo	Zacks
Monster	13.30	11.81	13.92	13.80

- Use as support when selecting EPS projection

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Earnings Call Transcripts

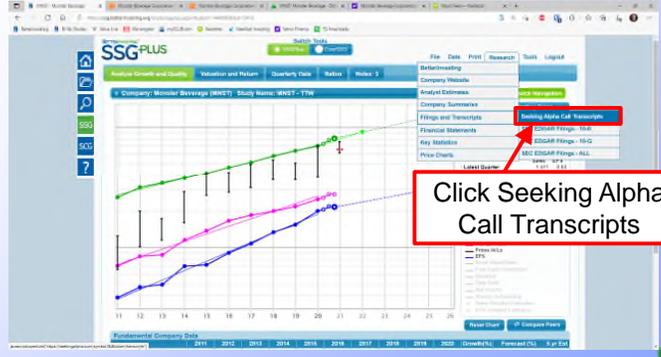
- What is it?
Links to quarterly conference call transcripts
- How to use it?
 - Listen to conference calls to get a feel for management's optimism or pessimism
 - Listen to analyst questions and comments



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Earnings Call Transcripts

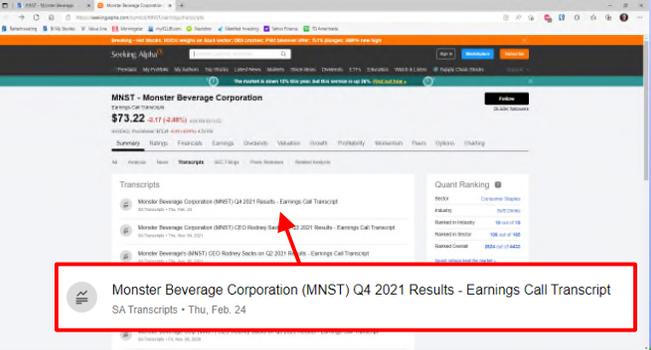




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Earnings Call Transcripts

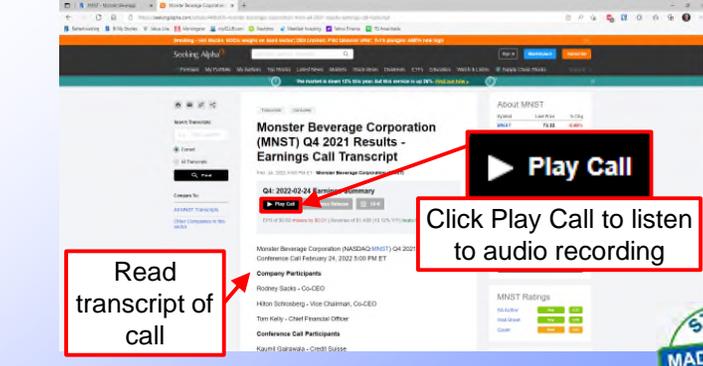




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Earnings Call Transcripts





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IN SEARCH OF HIDDEN GEMS

Stock Investing Made Easy

Summary

In this session we:

- Explored online tools to assist with research and judgments
- Explored:
 - Member Sentiment
 - Analyst Estimates
 - Earnings Call Transcripts

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Questions or Comments?

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Dan Harter

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BetterInvesting Portfolio Reports for Effective Investment Management



Instructor:
Dori Raser, Director,
Golden West and Rocky Mountain Chapters

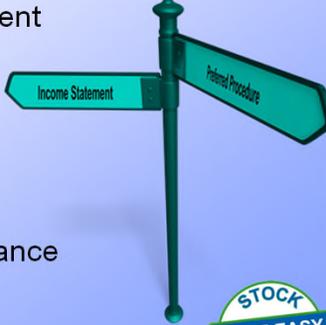
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Objectives

- Review Portfolio Management reports:
 - Summary report
 - Diversification reports
 - Portfolio Evaluation Review Technique or PERT Report
- Share BetterInvesting guidance



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Stock Investing Made Easy

How to Access Reports

From the BI Homepage click –
 “My Studies” under “Online Tools”

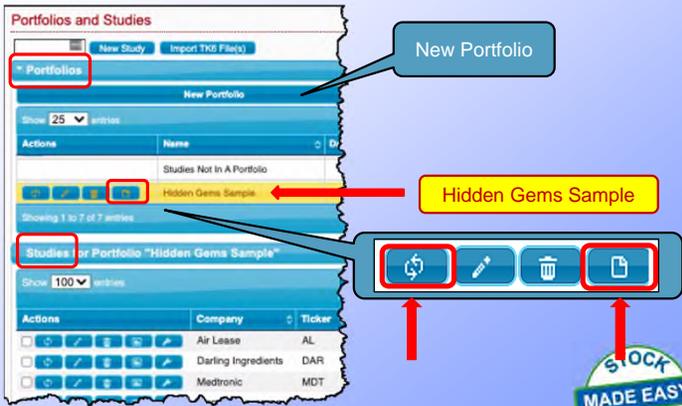


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Portfolios and Studies



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Summary Report

Report Options

Summary | PERT | **Diversification**



Report Details

Show All entries

		Portfolio Total Value			Portfolio dollar-weighted average			USDS: 6.8		%Total Return: 20.4	
Ticker	Company	Price	Shares	Total Value	% of Portfolio	Current PE	Buy Below	Sell Above	USDS	% Tot Ret	Rec
AL	Air Lease	39.11	1.0	39.11	2.8	11.0	40.70	73.60	3.4	19.0	Buy
DH	D.R. Horton	86.51	1.0	86.51	6.2	6.9	60.50	130.40	1.3	14.9	Hold
DAR	Darling Ingredients	78.17	1.0	78.17	5.6	20.1	75.20	113.50	2.5	11.2	Hold
FIVE	Five Below	157.82	1.0	157.82	11.4	33.9	273.20	612.70	11.5	37.7	Buy
FOXF	Fox Factory Holding	108.82	1.0	108.82	7.8	28.1	119.50	217.60	4.1	19.6	Buy
MED	Medfast	188.70	1.0	188.70	13.6	13.6	227.90	347.40	10.6	18.4	Buy
MDT	Medtronic	107.65	1.0	107.65	7.8	29.7	99.60	143.50	1.9	11.0	Hold
MNSI	MKS Instruments	149.07	1.0	149.07	10.7	15.1	149.50	240.40	3.0	14.5	Buy
MNST	Monster Beverage	83.35	1.0	83.35	6.0	32.4	87.50	129.00	4.0	12.4	Buy
OLL	Offle's Bargain Out	43.44	1.0	43.44	3.1	16.1	64.50	135.90	8.8	31.6	Buy
SWKS	Skyworks Solutions	136.86	1.0	136.86	9.9	16.4	183.10	313.00	12.9	23.5	Buy
V	Visa	207.23	1.0	207.23	14.9	34.3	261.70	464.90	7.6	22.8	Buy

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Diversification Report

Report Options

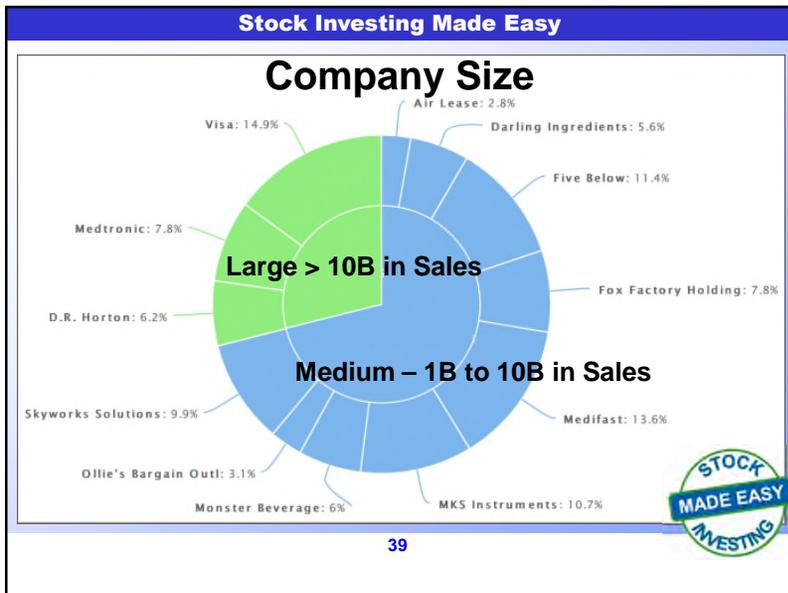
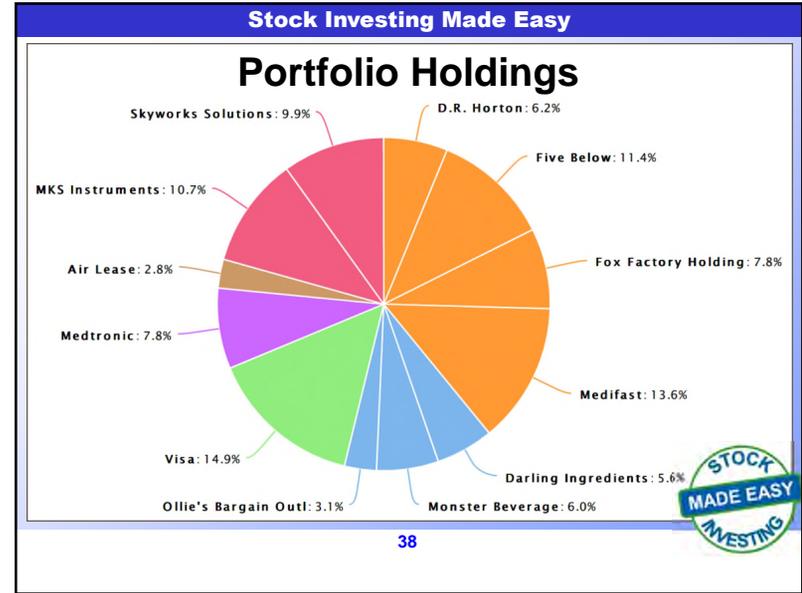
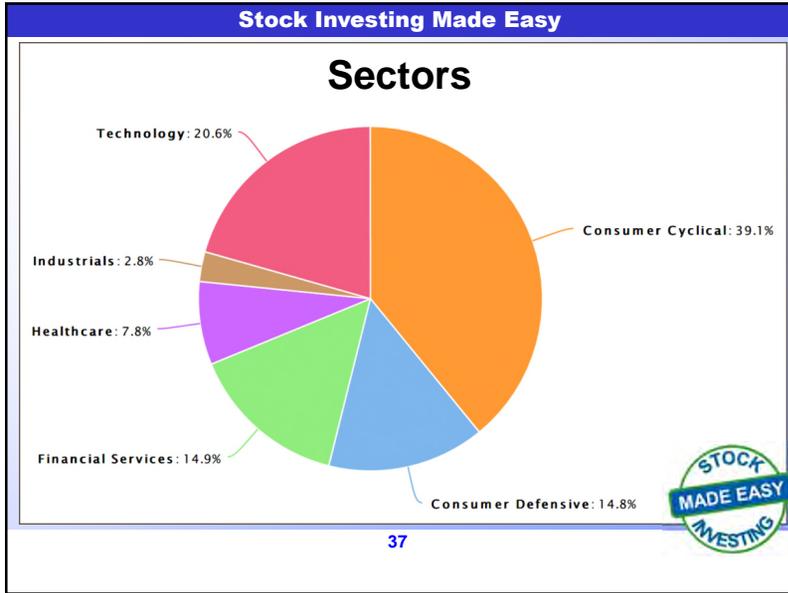
Summary | PERT | **Diversification**

- Sectors
- Industries
- Portfolio Holdings
- Company Size

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- Stock Investing Made Easy**
- BI Diversification Guidance**
- **Sectors**
 - 4 or more
 - < 30% in any one sector
 - **Portfolio Holdings**
 - No more companies than you can monitor
 - Consider 12-20 companies
 - **Company Size**
 - 25% small
 - 50% medium
 - 25% large
- 40
-

IN SEARCH OF HIDDEN GEMS

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Summary Report

Report Options: Summary | **PERT** | Diversification

% Total Return 20.4

Report Details: Portfolio Total Value: \$1,388.73 | Portfolio dollar-weighted average: USDS: 6.8 | % Total Return: 20.4

Company	Price	Shares	Total Value	% of Portfolio	Current PE	Buy Below	Sell Above	USDS	% Tot Ret	Rec
AL Air Lease	39.11	1.0	39.11	2.8	11.0	40.70	73.60	3.4	19.0	Buy
DH D.R. Horton	86.51	1.0	86.51	6.2	6.9	80.50	130.40	1.3	14.9	Hold
DAR Darling Ingredients	78.17	1.0	78.17	5.6	20.1	75.20	113.50	2.5	11.2	Hold
FIVE Five Below	157.82	1.0	157.82	11.4	33.9	273.20	612.70	11.5	37.7	Buy
FOXF Fox Factory Holding	108.82	1.0	108.82	7.8	28.1	119.50	217.60	4.1	19.6	Buy
MED Medifast	188.70	1.0	188.70	13.6	13.6	227.90	347.40	10.6	18.4	Buy
MDT Medtronic	107.65	1.0	107.65	7.8	29.7	99.60	143.50	1.9	11.0	Hold
MKSI MKS Instruments	149.07	1.0	149.07	10.7	15.1	149.50	240.40	3.0	14.5	Buy
MNST Monster Beverage	83.35	1.0	83.35	6.0	32.4	87.50	129.00	4.0	12.4	Buy
OLLI Ollie's Bargain Outl	43.44	1.0	43.44	3.1	16.1	64.50	135.90	8.8	31.6	Buy
SWKS Skyworks Solutions	136.86	1.0	136.86	9.9	16.4	193.10	313.00	12.9	23.5	Buy
V Visa	207.23	1.0	207.23	14.9	34.3	261.70	464.90	7.6	22.8	Buy

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PERT Report

Company Name	Div	% Yield	Est EPS Next 12 Mo	EPS Qtr End	% Chg	Sales Mill \$	% Chg	Pre-Tax Profit Mill \$	% Chg	TTM EPS \$	% Chg	Proj PE	Price	Proj 5Y P/E Ratios Hi Avg/Low	Est EPS Growth	PEG Ratio	UD Ratio	% Total Return	Est 5 Years Low Price	High Price
Five Below	0.00	0.0	6.13	10/21/0.43	19.4%	607.6	27.5%	31.8	34.9%	5.2%	4.66	139.0%	157.82	79.4	42.7/32.5/22.2	31.5	0.8	11.5	37.7	103.5/782.4
Ollie's Bargain Outl	0.00	0.0	2.81	10/20/0.36	-47.1%	383.5	-7.5%	30.1	-47.9%	7.9%	2.70	-22.0%	43.44	54.3	38.5/28.5/18.5	3.0	4.0	8.8	31.6	28.8/171.5
Air Lease	0.67	1.7	4.22	12/21/1.24	31.9%	597.2	22.1%	188.4	36.7%	31.5%	3.56	18.9%	39.11	103.4	10.8/8.8/6.8	18.5	0.5	6.3	28.6	24.2/133.1
Skyworks Solutions	2.06	1.5	9.34	12/21/2.40	-21.3%	1510.4	0.0%	436.1	-23.6%	28.9%	8.32	31.2%	136.86	77.4	23.7/19.0/14.2	12.2	1.2	12.9	23.5	118.1/378.0
Visa	1.28	0.6	7.19	12/21/1.83	28.9%	7059.0	24.1%	4897.0	30.7%	69.4%	6.04	24.8%	207.23	87.6	39.3/32.9/26.5	19.0	1.5	7.6	22.8	160.1/566.5
Fox Factory Holding	0.00	0.0	4.33	12/21/0.66	-31.8%	1425.0	19.1%	419.0	4.5%	29.4%	2.57	-2.7%	108.82	122.2	13.3/12.18	13.8	8.0	25.1	70.4	266.7
Medifast	5.68	3.0	15.5	12/20/3.05	1510.0%	1510.0	0.0%	570.9	-23.6%	37.8%	6.34	31.2%	188.70	14.3%	13.89/8.0%	14.3	12.4	18.8	188.70	168.1/407.1
D.R. Horton	0.80	0.9	12.83	12/21/1.78	48.1%	7053.0	18.9%	1497.3	44.8%	21.2%	12.46	68.4%	86.51	87.7	12.5/10.0/7.4	3.0	2.2	1.3	14.9	25.5/165.3
MKS Instruments	0.88	0.6	10.62	12/21/2.69	29.3%	763.9	15.7%	178.6	27.1%	23.4%	9.90	56.6%	149.07	91.1	20.3/15.4/10.5	7.3	1.9	3.0	14.5	104.0/285.8
Monster Beverage	0.00	0.0	2.79	12/21/0.66	-31.8%	1425.0	19.1%	419.0	4.5%	29.4%	2.57	-2.7%	83.35	92.7	38.4/32.2/26.0	8.7	3.4	4.0	12.4	16.0/265.0
Darling Ingredients	0.00	0.0	4.09	12/20/0.27	117.0%	1019.8	56.4	5.5%	1.78	5.5%	1.78	19.1	78.17	93.6	26.4/20.4/14.5	2.2	3.7	2.5	25.5	25.5/285.8
Medtronic	2.32	2.2	3.91	01/21/1.07	17.0%	7775.0	-0.2%	1220.0	15.7%	15.7%	12.34	69.6%	107.65	102.1	31.6/27.6/22.4	7.6	3.6	1.9	11.0	11.0/285.8

Quality | Value

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PERT – Quality Side

Company Name	Div	% Yield	Est EPS Next 12 Mo	EPS Qtr End	% Chg	Sales Mill \$	% Chg	Pre-Tax Profit Mill \$	% Chg	Sales \$	% Chg	TTM EPS
Five Below	0.00	0.0	6.13	10/21/0.43	19.4%	607.6	27.5%	31.8	34.9%	5.2%	4.66	139.0%
Ollie's Bargain Outl	0.00	0.0	2.81	10/20/0.36	-47.1%	383.5	-7.5%	30.1	-47.9%	7.9%	2.70	-22.0%
Air Lease	0.67	1.7	4.22	12/21/1.24	31.9%	597.2	22.1%	188.4	36.7%	31.5%	3.56	18.9%
Skyworks Solutions	2.06	1.5	9.34	12/21/2.40	-21.3%	1510.4	0.0%	436.1	-23.6%	28.9%	8.32	31.2%
Visa	1.28	0.6	7.19	12/21/1.83	28.9%	7059.0	24.1%	4897.0	30.7%	69.4%	6.04	24.8%

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PERT – Quality Action Steps

- Research the magenta boxes.
 - Investigate why.
 - Trailing Twelve Months EPS is key.
- Make a decision.
 - Sell the stock.
 - Wait it out.
 - Change your projections.

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IN SEARCH OF HIDDEN GEMS

Stock Investing Made Easy

PERT – Quality Side

Company Name	Div	% Yield	Est EPS Next 12 Mo	EPS		Sales		Pre-Tax Profit			TTM EPS		
				Qtr End	\$	% Chg	Mill \$	% Chg	Mill \$	% Chg	% Sales	\$	% Chg
Five Below	0.00	0.0	6.13	10/21 10/20	0.43 0.36	19.4 %	607.6 476.6	27.5 %	31.8 23.6	34.9 %	5.2 % 4.9 %	4.66 1.95	139.0 %
Ollie's Bargain Outl	0.00	0.0	2.81	10/21 10/20	0.36 0.68	-47.1 %	383.5 414.4	-7.5 %	30.1 57.9	-47.9 %	7.9 % 14.0 %	2.70 3.46	-22.0 %
Air Lease	0.67	1.7	4.22	12/21 12/20	1.24 0.94	31.9 %	597.2 489.1	22.1 %	188.4 137.8	36.7 %	31.5 % 28.2 %	3.56 4.39	-18.9 %
Skyworks Solutions	2.06	1.5	9.34	12/21 12/20	2.40 3.05	-21.3 %	1510.4 1510.0	0.0 %	436.1 570.9	-23.6 %	28.9 % 37.8 %	8.32 6.34	31.2 %
Visa	1.28	0.6	7.19	12/21 12/20	1.83 1.42	28.9 %	7059.0 5687.0	24.1 %	4897.0 3748.0	30.7 %	69.4 % 65.9 %	6.04 4.84	

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PERT – Value Side

Company Name	Div	Proj PE	Price	Proj RV	Proj 5Yr P/E Ratios			Est EPS Growth	PEG Ratio	U/D Ratio	% Total Return	Est 5 Years	
					Hi	Avg	Low					Low Price	High Price
Five Below	0.00	25.8	157.82 3/3/2022	79.4	42.7	32.5	22.2	31.5	0.8	11.5	37.7	103.5	782.4
Ollie's Bargain Outl	0.00	15.5	43.44 3/3/2022	54.3	38.5	28.5	18.5	3.9	4.0	8.8	31.6	28.8	171.5
Air Lease	0.67	9.3	39.11 3/3/2022	105.4	10.8	8.8	6.8	18.5	0.5	6.3	28.6	24.2	133.1
Skyworks Solutions	2.06	14.7	136.86 3/3/2022	77.4	23.7	19.0	14.2	12.2	1.2	12.9	23.5	118.1	378.0
Visa	1.28	28.8	207.23 3/3/2022	87.6	39.3	32.9	26.5	19.0	1.5	7.6	22.8	160.1	566.5
Fox Factory Holding	0.00	25.1	108.82 3/3/2022	87.6	39.1	28.7	18.2	12.0	2.1	4.1	19.6	70.4	

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**PERT – Value Side
Directly from the SSG**

Company Name	Div	Proj PE	Price	Proj RV	Proj 5Yr P/E Ratios			Est EPS Growth	PEG Ratio	U/D Ratio	% Total Return	Est 5 Years	
					Hi	Avg	Low					Low Price	High Price
Five Below	0.00	25.8	157.82 3/3/2022	79.4	42.7	32.5	22.2	31.5	0.8	11.5	37.7	103.5	782.4

- **Estimated EPS Growth:** Page 1, Section 2
- **Est 5 Years Low / High Price:** Page 2, Section 4A/B
- **Upside/Downside Ratio:** Page 2, Section 4
- **% Total Return:** Page 2 Section 5C

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**PERT – Value Side
Calculated from the SSG**

Company Name	Div	Proj PE	Price	Proj RV	Proj 5Yr P/E Ratios			Est EPS Growth	PEG Ratio	U/D Ratio	% Total Return	Est 5 Years	
					Hi	Avg	Low					Low Price	High Price
Five Below	0.00	25.8	157.82 3/3/2022	79.4	42.7	32.5	22.2	31.5	0.8	11.5	37.7	103.5	782.4

- **Projected PE:**
Current Price ÷ Projected 12-month EPS
- **Projected 5 Year PE Ratios:**
SSG Page 2; Sec 4
Average of High/Low P/Es

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Stock Investing Made Easy

PERT – Value Side Calculated from the SSG

Company Name	D	Proj PE	Price	Proj RV	Proj 5Yr P/E Ratios			Est EPS Growth	PEG Ratio	U/D Ratio	% Total Return	Est 5 Years	
					Hi	Avg	Low					Low Price	High Price
Five Below	0.0	25.8	157.82 3/3/2022	79.4	42.7	32.5	22.2	31.5	0.8	11.5	37.7	103.5	782.4

- **Projected Relative Value**
Projected PE Ratio ÷ Average Projected PE Ratio
- **PEG Ratio:**
Projected P/E Ratio ÷ Projected EPS Growth Rate



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PERT – Value Side BI Guidance

Potential Buys

- Higher total return
- Historically underpriced
- Upside/downside ≥ 3:1
- Relative Value <100
- PEG ratio <1.5

Potential Sells

- Lower total return
- Historically overpriced
- Upside/downside ≤ 1:1
- Relative value >150
- PEG ratio >2



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Stock Investing Made Easy

PERT – Value Side

Company Name	D	Proj PE	Price	Proj RV	Proj 5Yr P/E Ratios			Est EPS Growth	PEG Ratio	U/D Ratio	% Total Return	Est 5 Years	
					Hi	Avg	Low					Low Price	High Price
Five Below	0.0	25.8	157.82 3/3/2022	79.4	42.7	32.5	22.2	31.5	0.8	11.5	37.7	103.5	782.4
Ollie's Bargain Out!	0.0	15.5	43.44 3/3/2022	54.3	18.5	28.5	18.5	3.9	4.0	8.8	31.6	28.8	171.5
Air Lease	0.0	9.3	39.11 3/3/2022	105.4	10.8	8.8	6.8	18.5	0.5	6.3	28.6	24.2	133.1
Skyworks Solutions	2.0	14.7	136.86 3/3/2022	77.4	23.7	19.0	14.1	12.2	1.2	12.9	23.5	118.1	378.0
Visa	1.3	28.8	207.23 3/3/2022	87.6	9.3	32.9	26.5	19.0	1.5	7.6	22.8	160.1	566.5
Fox Factory Holding	0.0	25.1	108.82 3/3/2022	87.6	39.1	28.7	18.2	12.0	2.1	4.1	19.6	70.4	



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In Conclusion

- Reviewed portfolio management reports:
 - Summary
 - Diversification
 - PERT
- Shared BetterInvesting guidance
 - Increase total return
 - Manage risk



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Questions or Comments?

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Beyond Fundamental Analysis



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Objectives

- Introduce other ways to analyze quality companies
- Discuss usefulness and importance
- Where to find these other ways
- How to use them to improve results



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Beyond Fundamental Analysis (BFA)

- Three ways to analyze a company:
 - Fundamental: study of financial statements
 - Sentiment: study of supply and demand
 - Also known as support and resistance
 - Technical: study of price action and volume



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Using BFA

- Find quality company using BI's Stock Selection Guide (SSG)
- Determine when quality company is a good investment using Beyond Fundamental Analysis
 - What Camp Are You In? A Look at 3 Investing Philosophies.
 - *BetterInvesting Magazine* 1/1/2022 page 41



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Finding BFA





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Finding BFA





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Sentiment Analysis

- Sentiment Analysis = candlesticks
- Candlesticks show price open, high, low, close
- www.bigcharts.marketwatch.com
 - Plot yearly candlesticks
 - Compare candlestick information to BetterInvesting's high / low price information



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Candlesticks at Bigcharts

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2
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White/Green or open candles - price up
Red/Black or filled candles - price down

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BI's Price Bars versus Candlesticks

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Candlesticks at StockCharts

- www.stockcharts.com
- Chart weekly / daily candlesticks
- Annotate chart
- Learn about candlesticks at ChartSchool

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ChartSchool

Welcome to ChartSchool, our extensive educational resource for investors of all levels. Here you can learn everything there is to know about investing and financial chart analysis.

Browse through the articles below, or search to find exactly what you're looking for.

Candlesticks

Search Criteria

Show me all ChartSchool Articles containing

Here are all the **ChartSchool** articles we found that contain **Candlesticks**

Introduction to Candlesticks - ChartSchool

...Blending **Candlesticks** **Candlestick** patterns are made up of one or more **candlesticks** and can be blended together to form one **candlestick**...

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Understanding Candlesticks

- Explains the logic behind candlesticks
 - <https://www.topdogtrading.com/candlestick-charting-trading-part-1/>
 - <https://www.topdogtrading.com/candlestick-charting-trading-part-2/>
 - <https://www.topdogtrading.com/candlestick-charting-trading-part-3/>



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Technical Indicators

By functionality and applicability (see ChartSchool):

- Trend indicators:
 - Moving Average (MA)
 - Moving Average Convergence Divergence (MACD)
 - Parabolic Stop-and-Reversal (Parabolic SAR)
- Momentum indicators:
 - Relative Strength Indicator (RSI)
 - Stochastic (STO)
 - Commodity Channel Index (CCI)
 - Williams Percent Range (Williams %R)



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Technical Indicators continued

By functionality and applicability:

- Volatility indicators:
 - Bollinger Bands (BB)
 - Moving Average Envelopes
 - Average True Range (ATR)
- Volume indicators:
 - On Balance Volume (OBV)
 - Chaikin Money Flow (CMF)



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Simple Technical Analysis (TA)

- Add Moving Averages (MA) to chart
- Example: 8, 21, & 55 period Exponential Moving Averages (EMA)
 - Numbers are Fibonacci Sequence
 - Shorter (8) / mid (21) / longer (55) term periods
- Add On Balance Volume (OBV)



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StockCharts SharpChart MMM Go

Chart Attributes

Period: Weekly Range: Fill the Chart Bar: 5 Gap: 0 Extra Bars: 0

Type: Candlesticks Size: 700 Color Scheme: Default Up Color: -Auto- Down Color: -Auto- Legends: Default

Volume: Overlay Full Quote Price Labels Log Scale Solid Candles Color Volume Smoothed Lines Y-Axis Labels Zoom Thumbnail

Overlays

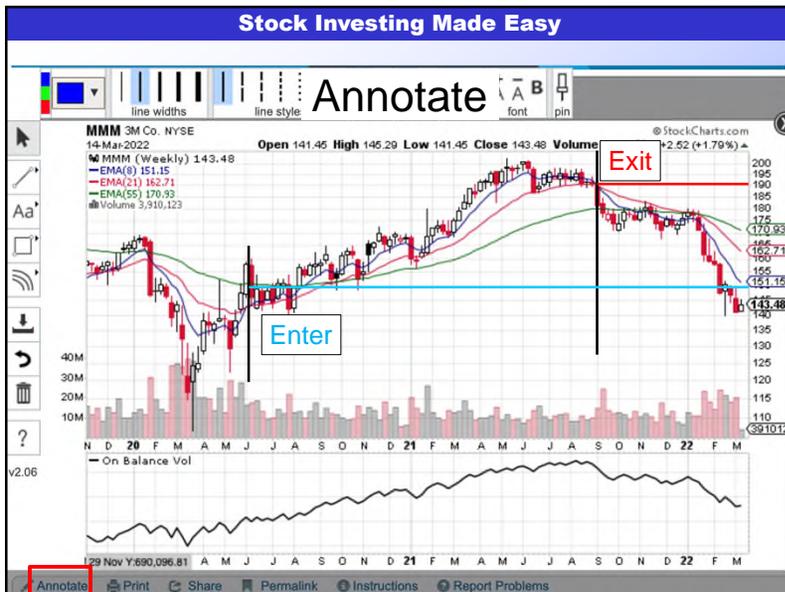
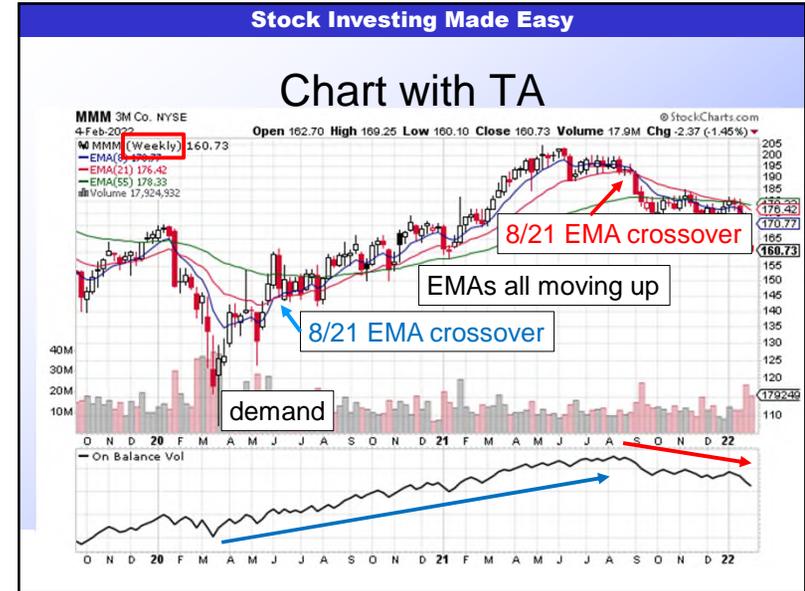
Exp. Moving Avg	Parameters
Exp. Moving Avg	8
Exp. Moving Avg	21
Exp. Moving Avg	55

Indicators

On Balance Volume (OBV)	Parameters	Position
On Balance Volume (OBV)		Below
- None -		Below

Update Clear All

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Annualized Return on Investment (ARO I)

Calculation of AROI

- $((\text{Ending value} - \text{beginning value}) / \text{beginning value}) * 100$
 $((192.92 - 150.88) / 150.88) * 100 = 27.86\% \text{ ROI}$
- $(\text{Return on Investment} / \text{number of days held}) * 365$
 $27.86\% / 458 \text{ days} = .06\% \text{ ROI per day}$
 $.06\% * 365 = 22.2\% \text{ AROI}$
- <https://www.thecalculatorsite.com/finance/calculators/cagr-calculator.php> (compound annual growth rate – CAGR)

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Portfolio Management - Exit Strategy

- Manage using Fundamental Analysis
 - Sell zone / Relative Value
- Manage using Technical Analysis
 - Trailing stop loss once SSG gets overvalued
 - Other technical indicators (e.g. EMA crossover)
- Manage using Options (future advanced class)
 - Buy put option as insurance on stock/portfolio

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Summary

In this session we've touched on how to:

- Analyze companies Beyond Fundamental Analysis using Sentiment and Technical Analysis
- Find supply / demand zones with candlesticks
- Improve portfolio returns using EMAs / OBV to help with entry and exit

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Questions or Comments?

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Make A Difference In Someone's Life

If you have benefited from **BETTERINVESTING**, please pick up some **BETTERINVESTING** materials and introduce others to this dynamic investment education opportunity!

Pay it forward !

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BetterInvesting National Convention

BetterInvesting 70th National Convention | BINC 2022

6/23/2022 - 6/26/2022

The Westin Dallas Park Central

- Choose from over 60 live in-person investor education classes
- Talk face-to-face with nationally recognized experts
- Attend the *Beyond Beginner* or *Investing for High-Net-Worth Individuals* series of classes

See the BI Website for Class & Registration Details



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Mark Your Calendars

EVENTS

Wednesday, August 31, 2022

Please save the date for another *Stock Investing Made Easy* Online Webinar

8:30 PM EDT / 7:30 CDT / 6:30 MDT / 5:30 PDT / 4:30 AKDT

Speaker(s) and topic to be determined



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Thank you



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