SAMPLE SWING TRADING PLAN

INTERMEDIATE-TERM STOCK SWING TRADING WITH CHART PATTERNS

TRADE BY DESIGN:
DESIGN THE TRADE
TRADE THE DESIGN
KEEP THE DESIGN AND TRADE SIMPLE
TAKE RESPONSIBILITY FOR THE DESIGN AND TRADE

DRAFT

STOCK TRADING PLAN

INTERMEDIATE-TERM SWING TRADING

For: ______________________________

Mentor: ____________________________

Date: ______________________________

SAMPLE STOCK TRADING PLAN
INTERMEDIATE-TERM SWING TRADING

Objective

To trade stocks in intermediate-term rallies in a long-term uptrend with a buy point at price breakout after completion of chart price pattern/base following a price rally/impulse.

Watch List Criteria

Identify favorable market trends, strong sectors, outperforming industries and subindustries, and then stocks with sound fundamentals and technicals.

1. Develop market posture: direction of S&P 500 Futures, S&P 500 Index and VIX indicator: up or sideways direction using five-year weekly chart.
2. Identify outperforming industries and subindustries within strong sectors from industry research data provided by the Brokerage firm.
3. Find stocks with good fundamentals and technicals with the trading platforms screening/scanning functions.

Fundamentals

Suggested Criteria:

Return on Equity: __________%

EPS Growth (Last Quarter vs. Prior Year): __________%

EPS Growth (5-year Historical): __________%

Revenue Growth (Last Quarter vs Prior Year): __________%

Technicals

- Stock Price (minimum): $__________
- Volume 50-day average (minimum) ____________
- Up trend on a five-year weekly chart:

    40 SMA angling up

- Strength of uptrend on five-year weekly chart:

SAMPLE STOCK TRADING PLAN
INTERMEDIATE-TERM SWING TRADING

10 SMA above 40 SMA and Price action above both 10 SMA and 40 SMA

- Identify formation of a price impulse and retrace of less than 60% with Zig-Zag indicator and Fibonacci retracement tool
- Identify formation of a chart pattern/base:
    - Cup Base
    - Cup with Handle Base
    - Rectangular Base
    - Double Bottom Base
- Identification of the base top and bottom
- Identification of the projected target price
- Identification of potential stop loss point with Parabolic SAR indicator on 1-year daily chart
- Direction of Parabolic SAR on weekly chart to complement price action trend direction
- Direction of Accumulation Distribution Line Oscillator should be angling up

Calculations

- Identify Portfolio size $______________
- Determine acceptable Portfolio Risk (R) __________% $__________
- Allocate trade budget __________% $__________
- Determine Buy Point/Entry Price $__________
- Determine Stop Loss Price $_________
- Determine % Stop Loss __________%
- Determine % Gain __________%
- Determine Reward/Risk Ratio __________
- Accept Reward/Risk Ratio (Yes/No) __________

DO NOT PROCEED WITH TRADE IF REWARD/RISK IS NOT ACCEPTABLE

NO EXCUSES ONCE REWARD/RISK IS ACCEPTED

TAKE RESPONSIBILITY OF DECISION AND MANAGE RISK

SAMPLE STOCK TRADING PLAN
INTERMEDIATE-TERM SWING TRADING

Entry Rules

Before entering trade, review again:

a. Market Conditions
b. Stock Chart Price Action

Market Conditions

Since most stocks move in the same direction as the overall market, make new buys only during an uptrend of the market, this gives a better probability of success.

Stock Chart Price Action

1. Track the stock's price action; buy only when it shows strength by trending higher on above average volume.
2. Make sure the stock is breaking out of a common chart pattern/base.
3. When you buy, the stock should also be in the proper buying range, not extended more than 5% above the ideal buying point/base top. Don't chase it, if you miss the train, see if you can catch the next one that comes along.
4. Ensure the buy price is still in line with you Reward/Risk Ratio.
5. Discuss with your mentor, for partial/scale-in buying. Partial buying may also help with Risk Management.
6. Ensure to use correct buy order.

Money Management

Manage risk by position-sizing and defining your max loss.

Position Sizing:

- Formula: Portfolio Risk / Trade Risk = number of shares to buy
- Portfolio Risk: No more than ______% of total portfolio value
- Trade Risk = Entry Price – Stop Price
- Total investment should not be more than _____% of portfolio in a single trade

Exit Rules

Periodically adjust the stop order to handle the exit. If the stock falls below your stop, the stop will trigger and the trade will be closed automatically. Discuss use of Stop Market, Stop Limit, Trailing Stop or manual stop order with your mentor to favour the trade.

Initial Stop order placement: Discuss with mentor. Use of Parabolic SAR value from daily chart may be acceptable (this is more readily available and comes in handy for the calculation/analysis). Stop loss generally suggested for this type of trade is 5% - 8% with anticipated 20% - 25% gain in favorable market conditions.

In consultation with the mentor, adjust stop after each partial profit exit to 3% - 5% below new support level.

Establish partial profit exits/scale-out rules with the mentor to favour the trade.

Ensure to use correct stop order.

Routines

Maintain your trades by following daily, weekly and monthly routines,

Daily Routines

- Monitor open positions
- Take partial profits to suit
- Adjust stop loss to suit
- Continue learning, don't overindulge in news/noise from the market, stay focused on Trading Plan
- Prepare and execute new buy orders as required

Weekly Routines

- Update Market Posture: Determine market trend by analyzing major indices
- Inspect watch list for stocks that are approaching buy points
- Prepare graphical analysis
- Prepare calculation to identify position size, % trade loss, % trade gain, reward/risk ratio to make Trade Go/No Go decision
- Select suitable trade/trades if have multiple candidates
- Monitor open positions: look for new levels of support and adjust stops accordingly
- Review graphical analysis and calculations with Mentor as required

Quarterly Routines

- Execute screening program for stocks
- Update current watch list by adding new stocks from the new screen
- Delete stocks from current watch list that are not on the new screen
- Good idea to keep and update a Trade Journal to review the trades to date:
  - Identify if stops placed and managed effectively

    - Does the position size need to be larger per trade? Smaller per trade?
    - Was market posture leading to correct trades for the trend
- Review executed trades with Mentor as required

SAMPLE STOCK TRADING PLAN
INTERMEDIATE-TERM SWING TRADING
QUALITY MANAGMENT

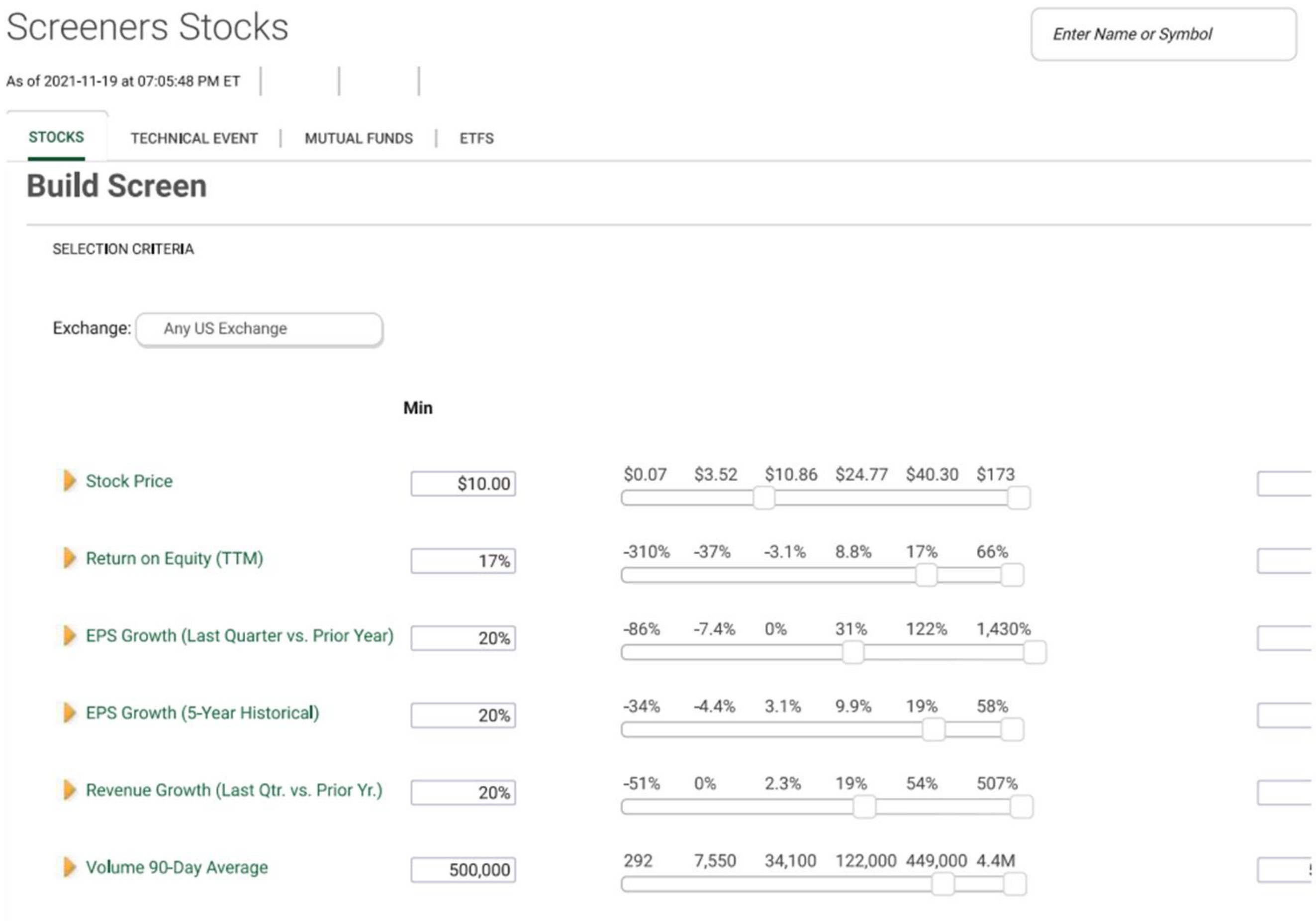
Quality Management

SAMPLE STOCK TRADING PLAN
INTERMEDIATE-TERM SWING TRADING

EXHIBITS

Exhibits

TYPICAL – WATCH LIST CRITERION FOR SCREENING
STOCKS WITH GOOD GROWTH AND PERFORMANCE



TYPICAL – WATCHLIST WITH FUNDAMENTALS DATA

Result Summary | **Detailed Results** | Performance | Related Screens

Rank	Symbol	Exchange	Name	Stock Price	Return on Equit	EPS Growth (La	EPS Growth (5-	Revenue Growtl	Volume 90-Day
1	DQ	NYSE	Daqo New Energy Corp	$66.33	51%	1,310%	47%	367%	2M
2	NUE	NYSE	Nucor Corp	$113	27%	1,300%	57%	103%	3.37M
3	TX	NYSE	Ternium SA	$38.02	44%	2,500%	149%	115%	818,000
4	SBSW	NYSE	Sibanye Stillwater Ltd	$13.31	71%	150%	88%	63%	2.89M
5	HUN	NYSE	Huntsman Corp	$32.22	23%	327%	65%	51%	2.37M
6	STX	NASDAQ	Seagate Technology Hol	$101	134%	165%	46%	35%	2.29M
7	CE	NYSE	Celanese Corp	$166	88%	161%	53%	61%	662,000
8	REGN	NASDAQ	Regeneron Pharmaceutic	$653	51%	268%	41%	51%	759,000
9	KKR	NYSE	KKR & Co Inc	$78.31	42%	65%	27%	137%	2.82M
10	HOLX	NASDAQ	Hologic Inc	$75.33	66%	96%	56%	42%	1.54M
11	EYE	NASDAQ	National Vision Holdings	$48.66	18%	300%	54%	111%	621,000
12	TTD	NASDAQ	The Trade Desk Inc	$108	26%	100%	106%	39%	4.67M
13	KLAC	NASDAQ	KLA Corp	$422	83%	159%	24%	35%	1.03M
14	ARES	NYSE	Ares Management Corp	$88.30	25%	97%	30%	94%	621,000
15	CMC	NYSE	Commercial Metals Co	$35.07	20%	121%	48%	44%	852,000
16	LRCX	NASDAQ	Lam Research Corp	$645	76%	48%	39%	35%	1.31M
17	DAR	NYSE	Darling Ingredients Inc	$71.44	18%	200%	30%	39%	1.26M

TYPICAL – WATCHLIST WITH FUNDAMENTAL DATA

18	ATH	NYSE	Athene Holding Ltd	$85.73	20%	66%	24%	173%	936,000
19	FND	NYSE	Floor & Decor Holdings Ir	$132	26%	157%	46%	28%	660,000
20	DHI	NYSE	D.R. Horton Inc	$102	30%	78%	26%	35%	2.44M
21	GNRC	NYSE	Generac Holdings Inc	$434	35%	97%	37%	34%	671,000
22	WGO	NYSE	Winnebago Industries Inc	$72.19	30%	96%	38%	40%	510,000
23	KBH	NYSE	KB Home	$43.49	18%	93%	30%	47%	1.19M
24	WSM	NYSE	Williams-Sonoma Inc	$216	69%	89%	21%	31%	927,000
25	AMKR	NASDAQ	Amkor Technology Inc	$25.26	22%	95%	45%	24%	1.14M
26	GOOGL	NASDAQ	Alphabet Inc	$2,980	31%	71%	21%	41%	1.42M
27	CPRT	NASDAQ	Copart Inc	$152	31%	54%	29%	42%	860,000
28	ADBE	NASDAQ	Adobe Inc	$688	45%	28%	54%	22%	1.85M
29	GOOG	NASDAQ	Alphabet Inc	$3,000	31%	71%	21%	41%	1.07M
30	ASML	NASDAQ	ASML Holding NV	$857	43%	68%	21%	32%	811,000
31	FNF	NYSE	Fidelity National Financia	$52.22	33%	73%	21%	26%	1.36M
32	TREX	NYSE	Trex Co Inc	$134	36%	29%	32%	45%	662,000
33	AMT	NYSE	American Tower Corp	$261	54%	52%	22%	22%	1.47M
34	ALGN	NASDAQ	Align Technology Inc	$683	23%	30%	66%	38%	578,000
35	ANET	NYSE	Arista Networks Inc	$129	23%	33%	37%	24%	1.85M
36	PKI	NYSE	PerkinElmer Inc	$189	22%	78%	28%	21%	713,000
37	EL	NYSE	The Estee Lauder Compa	$353	58%	32%	21%	23%	1.04M

TYPICAL – WATCHLIST WITH FUNDAMENTAL DATA

38	ENTG	NASDAQ	Entegris Inc	$154	26%	48%	31%	20%	737,000

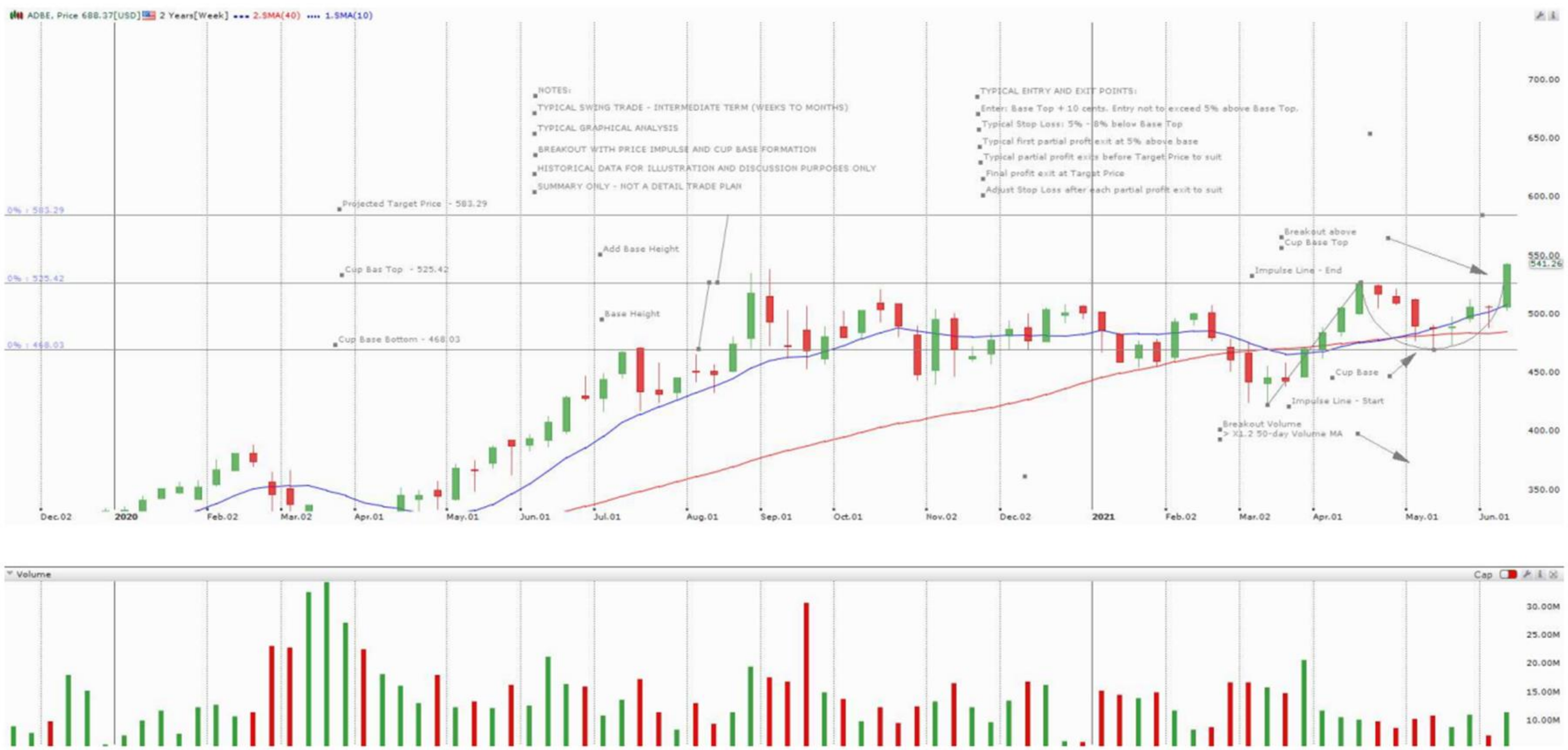
Columns Export 1 of 1 50

TYPICAL GRAPHICAL ANALYSIS - WEEKLY CHART SET-UP

Chart: ADBE.O

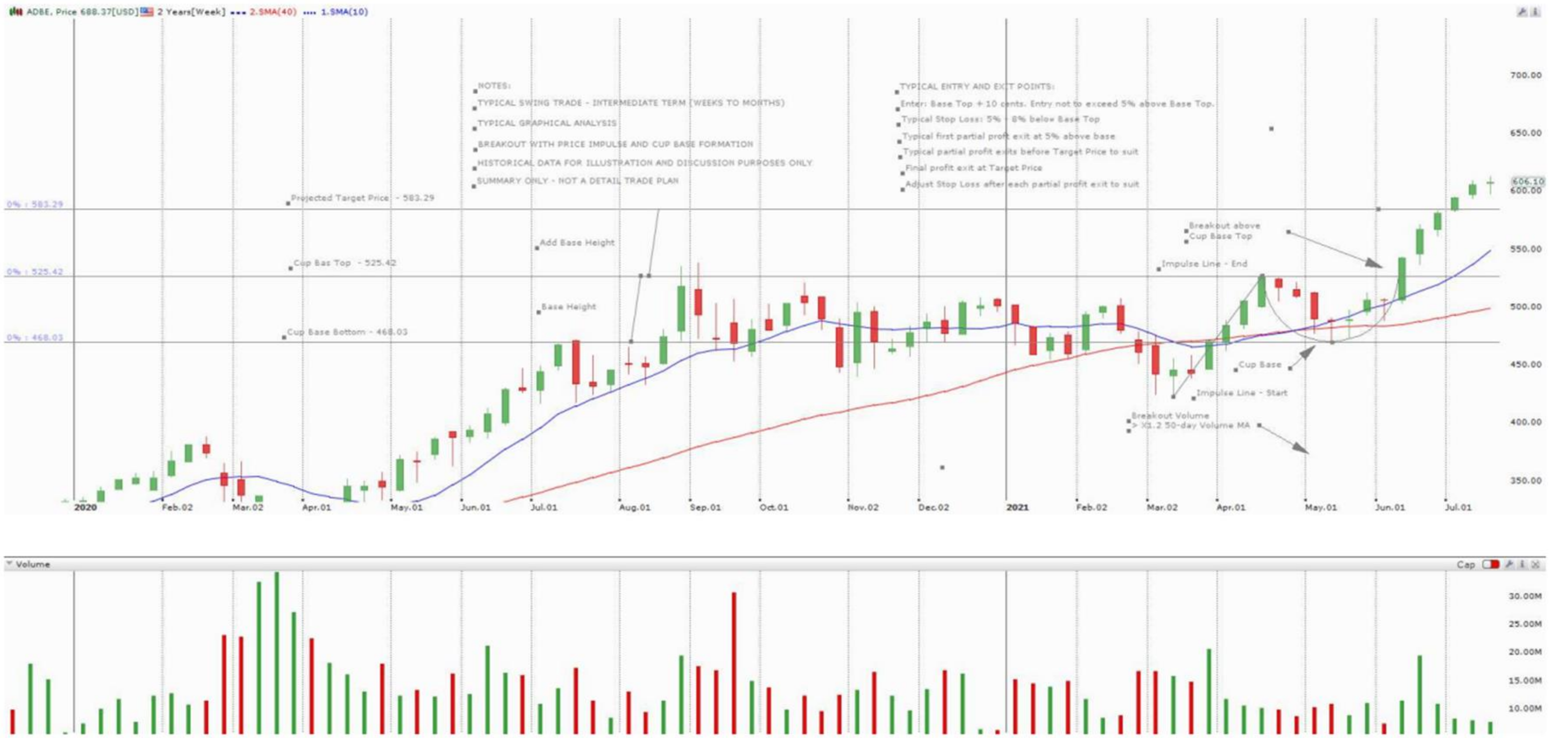
TYPICAL GRAPHICAL ANALYSIS – CUP PATTERN FORMATION BEFORE BREAKOUT

Chart: ADBE.O



TYPICAL GRAPHICAL ANALYSIS – CUP PATTERN FORMATION AFTER BREAKOUT

Chart: ADBE.O

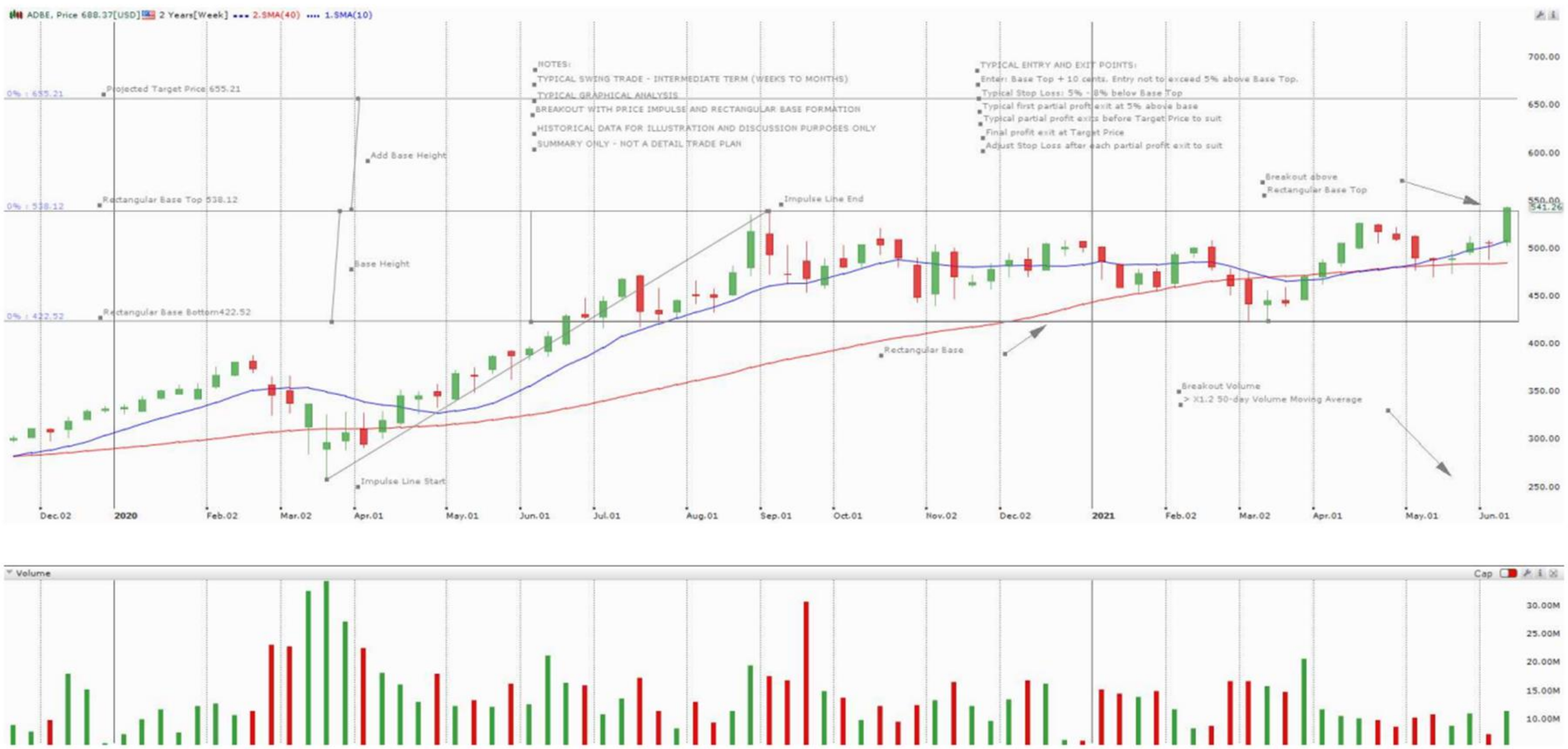


TYPICAL GRAPHICAL ANALYSIS – CUP AND HANDLE PATTERN FORMATION BEFORE BREAKOUT

Chart: ADBE.O

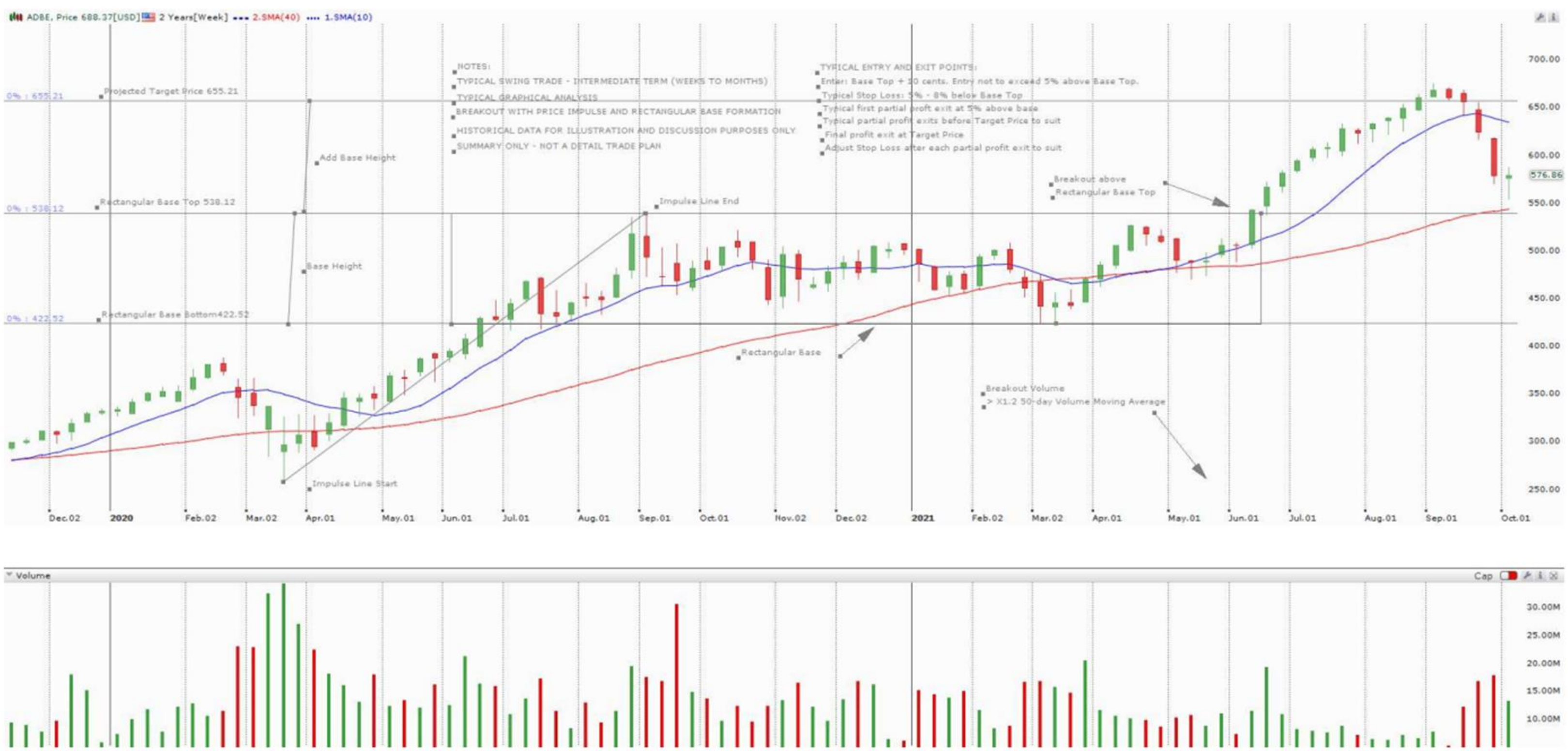
TYPICAL GRAPHICAL ANALYSIS – RECTANGULAR BASE PATTERN FORMATION BEFORE BREAKOUT

Chart: ADBE.O



TYPICAL GRAPHICAL ANALYSIS – RECTANGULAR BASE PATTERN FORMATION AFTER BREAKOUT

Chart: ADBE.O

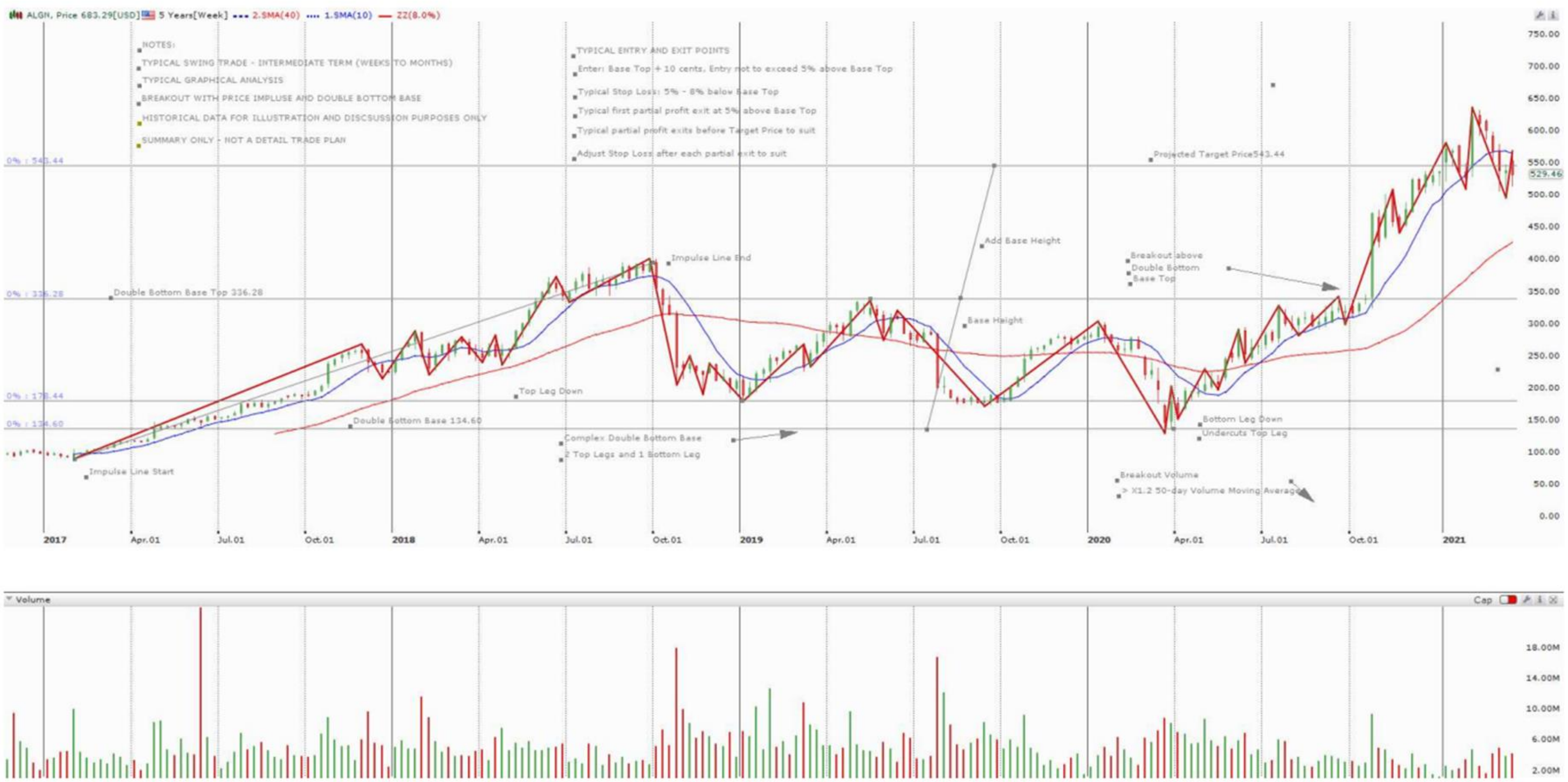


TYPICAL GRAPHICAL ANALYSIS – DOUBLE BOTTOM BASE PATTERN FORMATION BEFORE BREAKOUT

Chart: ALGN.O

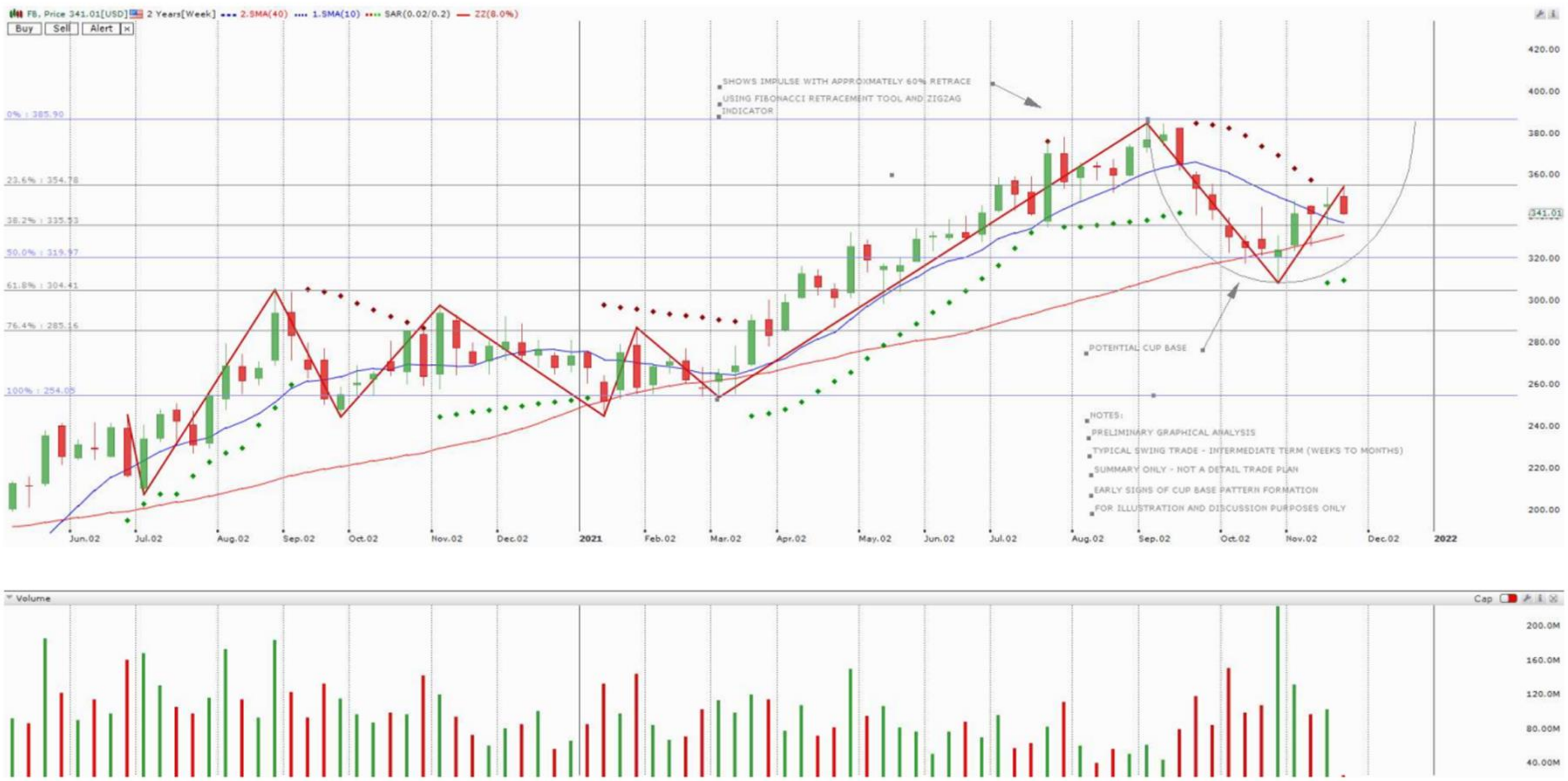
TYPICAL GRAPHICAL ANALYSIS – DOUBLE BOTTOM BASE PATTERN FORMATION AFTER BREAKOUT

Chart: ALGN.O



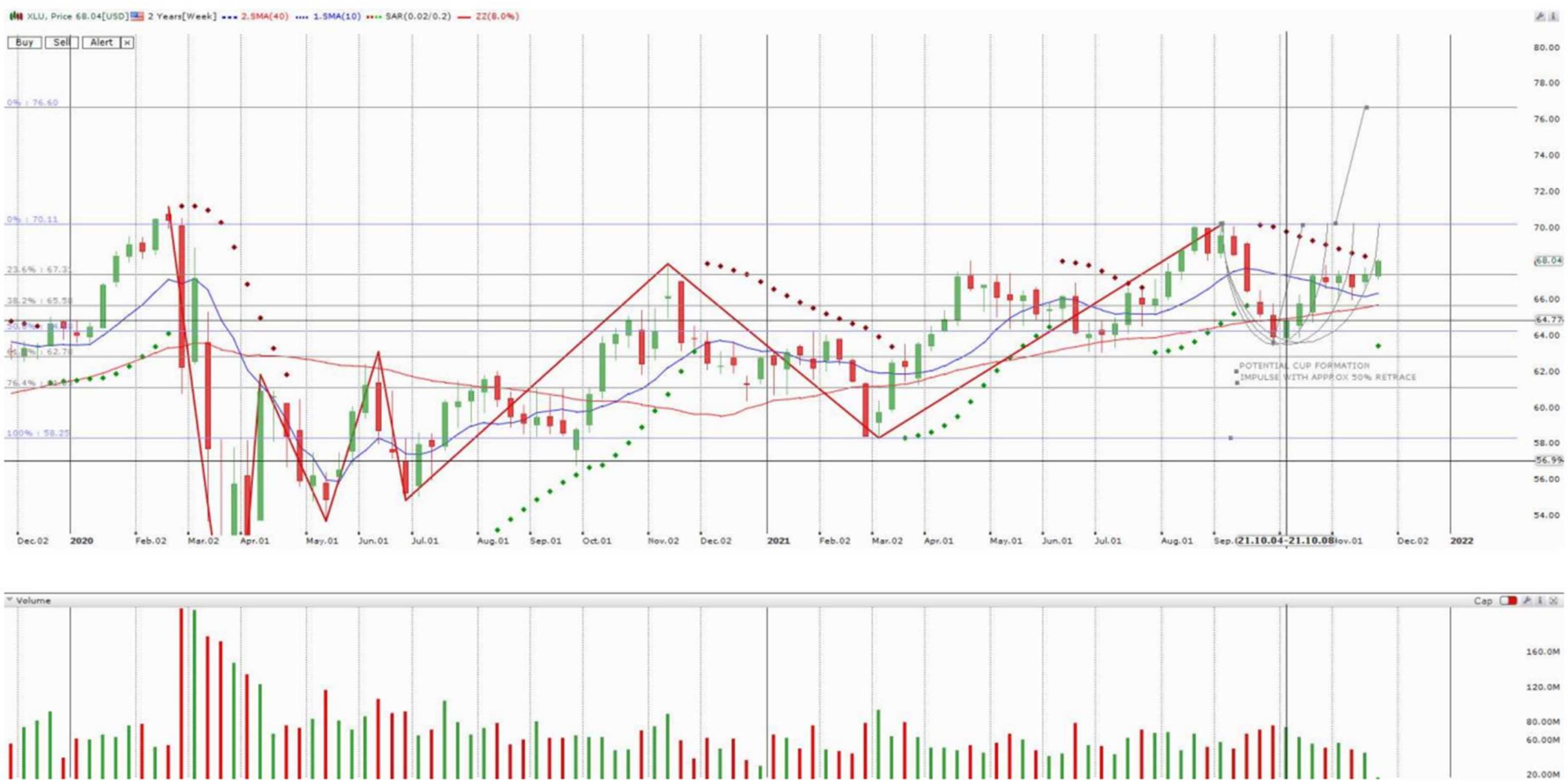
TYPICAL – PRELIMINARY GRAPHICAL ANALYSIS

Chart: FB.O



TYPICAL – PRELIMINARY GRAPHICAL ANALYSIS

Chart: XLU



TYPICAL – TRADE CALCULATION FORM/SPREADSHEET SETUP

Investment Record - 2021

DO NOT DEVIATE FROM PLAN

DON'T CHANGE STOP LOSS - WAIT FOR CLOSE EOD

Investment Trade Analysis - 2021

Month of XXXX 2021

b=buy, s=sell, r=review only

Trade By Design: Design the Trade then Trade the Design

Input data to open position

Input data to close position

Export data to place order

Scorecard: R/R >= 2.00 Go

Scorecard: R/R < 2.00 - No Go

NO DAY TRADING

Item	Review Date	Portfolio	Trade Type	Stock Symbol	Support ($)	Entry ($)	Target ($)	Portfolio Risk ($)	Stop Loss ($) SAR	Trade Risk	Position Size	Position Cost	100% Position Fill ($)	75% Position	25% Position	Reward ($)	Reward/Risk	Comm ($)	Est Gain ($)	Est Gain (%)	Day Close ($)	Running Gain($)	Trade Date Open Close
1	Swing Trade - 1-Stage																						
2	Swing Trade - 1-Stage																						
3	Swing Trade - 1-Stage																						
4	Swing Trade - 1-Stage																						

TYPICAL – TRADE CALCULATION ANALYSIS

Investment Record - 2021

DO NOT DEVIATE FROM PLAN
DON'T CHANGE STOP LOSS - WAIT FOR CLOSE EOD

Investment Trade Analysis - 2021

b=buy, s=sell, r=review only

Trade By Design: Design the Trade then Trade the Design

Month of XXXX 2021

Input data to open position

Input data to close position

Export data to place order

Scorecard: R/R >= 2.00 Go
Scorecard: R/R < 2.00 - No Go

NO DAY TRADING

Item	Review Date	Portfolio	Trade Type	Stock Symbol	Support ($)	Entry ($)	Target ($)	Portfolio Risk ($)	Stop Loss ($) SAR	Trade Risk	Position Size	Position Cost	100% Position Fill ($)	75% Position	25% Position	Reward ($)	Reward/Risk	Comm ($)	Est Gain ($)	Est Gain (%)	Day Close ($)	Running Gain($)	Trade Date
																							Open
																							Close
1				NUE		112.10	119.32	250	106.59	5.51	45	5086	5000			7.22	1.31	-14	328	6%			
	Swing Trade - 1-Stage												112.10								112.10		
									106.59	4.9%			45								0.0%		
													45										
													0.00									0.00	
2				DKS		141.21	166.45	250	132.56	8.65	29	4081	5000			25.24	2.92	-14	729	18%			
	Swing Trade - 1-Stage												141.21								141.21		
									132.56	6.1%			35								0.0%		
													29										
													0.00									0.00	
3				AAPL		155.05	176.28	250	146.37	8.68	29	4466	5000			21.23	2.45	-14	611	14%			
	Swing Trade - 1-Stage												155.05								155.05		
									146.37	5.6%			32								0.0%		
													30										
													0.00									0.00	
4				ADBE		674.62	787.87	250	644.73	29.89	8	5643	5000			113.25	3.79	-14	947	17%			
	Swing Trade - 1-Stage												674.62								674.62		
									644.73	4.4%			7								0.0%		
													8										
													0.00									0.00	

TYPICAL – TRADE RECORDS

Investment Record - 2021

DO NOT DEVIATE FROM PLAN
DON'T CHANGE STOP LOSS - WAIT FOR CLOSE EOD

Investment Trade Analysis - 2021

Month of XXXX 2021

b=buy, s=sell, r=review only

Trade By Design: Design the Trade then Trade the Design

Input data to open position

Input data to close position

Export data to place order

Scorecard: R/R >= 2.00 Go
Scorecard: R/R < 2.00 - No Go

Item	Review Date	Portfolio	Trade Type	Stock Symbol	Support ($)	Entry ($)	Target ($)	Portfolio Risk ($)	Stop Loss ($)	Trade Risk	Position Size	Position Cost	50% Position	30% Position	20% Position	Reward	Reward/Risk	Comm	Est Gain ($)	Est Gain (%)	Day Close	Running Gain ($)	Trade Date
1				XLK		158.62	173.88	150	150.69	7.93	19	3000	5000			15.26	1.92	-14	289	10%			
													158.65								167.06		
										5.0%			32								5.3%		
													19										
													159.79									159.79	
2				DKS		127.36	166.67	150	120.99	6.37	24	3000	5000			39.31	6.17	-14	926	31%			
													127.61								134.06		
										5.0%			39								5.1%		
													12										
													77.40									77.40	
3				BEN		31.15	35.90	150	29.59	1.56	96	3000	5000			4.75	3.05	-14	457	15%			
													31.10								35.01		
										5.0%			161								12.6%		
													96										
													375.55									375.55	
4				PLTR		25.33	33.60	150	24.06	1.27	118	3000	5000			8.27	6.53	-14	979	33%			
													25.59								26.89		
										5.0%			195								5.1%		
													50										
													65.00									65.00	
5				CPDI	0.33	12.03	12.13	50	11.96	0.07	758	9114	4600			0.099	1.50	-14	75	1%			
					0.099								12.03								12.02		
					0.066					0.5%			382								-0.1%		
													200										
													-1.40									-1.40	
6				AAPL	2.50	149.58	150.33	50	149.08	0.50	100	14958	4600			0.75	1.50	-14	75	1%			
					0.75								149.58								149.46		
					0.5					0.3%			31								-0.1%		
													30										
													-3.60									-3.60	
7				XLK		160.32	173.88	150	152.30	8.02	19	3000	5000			13.56	1.69	-14	254	8%			
													160.32								166.34		
										5.0%			31								3.8%		
													25										
													150.50									150.50	
8				NVDA	7.00	247.90	250.00	50	246.50	1.40	36	8854	4600			2.1	1.50	-14	75	1%			
					2.1								247.90								249.18		
					1.4					0.6%			19								0.5%		
													18										
													23.04									23.04	
9				MSFT		305.98	348.00	150	290.68	15.30	10	3000	5000			42.02	2.75	-7	412	14%			
													308.69								333.61		
										5.0%			16								8.1%		
													5										
													124.61									124.61	
10				PWR		121.12	147.26	150	115.06	6.06	25	3000	2200			26.14	4.32	-14	647	22%			
													120.80								118.20		
										5.0%			18								-2.2%		
													18										
													-46.78									-46.78	
11				FB		332.00	384.83	200	315.40	16.60	12	4000	3466			52.83	3.18	-14	637	16%			
													331.99								346.29		
						156.55				5.0%			10								4.3%		
													10										
													143.00									143.00	

TYPICAL – TRADE RECORDS

12	SNPS	341.50	398.78	150	324.43	17.08	9	3000	5952	57.28	3.35	-14	503	17%		
									341.50						345.91	
		156.55				5.0%			17						1.3%	
									9							
									39.69							39.69
13	XLI	106.76	119.64	200	101.42	5.34	37	4000	2871	12.88	2.41	-14	483	12%		
									106.45						107.01	
		156.55				5.0%			27						0.5%	
									25							
									14.00							14.00
14	PLTR	25.33	33.60	150	24.06	1.27	118	3000	5000	8.27	6.53	-7	979	33%		
									25.59						24.25	
						5.0%			195						-5.2%	
									50							
									-66.90							-66.90
15	EW	119.20	138.34	250	113.24	5.96	42	5000	6800	19.14	3.21	-14	803	16%		
									119.05						119.51	
						5.0%			57						0.4%	
									42							
									19.45							19.45
16	DKS	127.36	166.67	150	120.99	6.37	24	3000	5000	39.31	6.17	-7	926	31%		
									127.61						134.95	
						5.0%			39						5.8%	
									12							
									88.08							88.08
17	WGO	74.35	84.83	250	70.63	3.72	67	5000	5000	10.48	2.82	-14	705	14%		
									74.01						75.21	
					446.97	5.0%			68						1.6%	
									37							
									44.40							44.40
18	WGO	74.35	84.83	250	70.63	3.72	67	5000	5000	10.48	2.82	-7	705	14%		
									74.01						75.01	
					446.97	5.0%			68						1.4%	
									30							
									30.00							30.00
19	COIN	340.28	350.00	250	323.27	17.01	15	5000	5000	9.718	0.57	-14	143	3%		
									340.28						339.65	
					446.97	5.0%			15						-0.2%	
									50							
									-31.75							-31.75
20	COIN	340.28	350.00	250	323.27	17.01	15	5000	5000	9.718	0.57	-14	143	3%		
									340.14						339.44	
					446.97	5.0%			15						-0.2%	
									50							
									-34.95							-34.95
21	KLAC	413.42	450.00	250	392.75	20.67	12	5000	5000	36.58	1.77	-14	442	9%		
									413.42						415.06	
					446.97	5.0%			12						0.4%	
									12							
									19.68							19.68
22	ASML	837.30	880.00	250	795.44	41.87	6	5000	5000	42.7	1.02	-14	255	5%		
									837.27						844.79	
					446.97	5.0%			6						0.9%	
									5							
									37.60							37.60
23	YY	52.43	67.53	250	49.81	2.62	95	5000	5000	15.1	5.76	-14	1440	29%		
									52.06						52.42	
						5.0%			96						0.7%	
									100							
									36.00							36.00
24	VUZI	14.34	20.22	250	11.81	2.53	99	1417	5000	5.88	2.32	-14	581	41%		
									13.15						13.86	
						17.6%			380						5.4%	
									100							
									71.00							71.00
25	ASML	858.51	889.00	250	849.92	8.59	29	25000	5000	30.49	3.55	-14	888	4%		
									858.51						854.26	
					850.85	1.0%			6						-0.5%	

TYPICAL – TRADE RECORDS

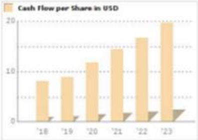
									25							
									-106.25							-106.25
26	ADBE	657.60	765.20	250	624.72	32.88	8	5000	5000	107.6	3.27	-14	818	16%		
									657.45						670.00	
						5.0%			8						1.9%	
									15							
									188.24							188.24
27	ASML	858.51	929.87	250	815.58	42.93	6	5000	5000	71.36	1.66	-14	416	8%		
									857.90						848.73	
						5.0%			6						-1.1%	
									10							
									-91.70							-91.70
28	DKS	134.44	153.64	250	127.72	6.72	37	5000	5000	19.2	2.86	-21	714	14%		
									134.61						137.04	
						5.0%			37						1.8%	
									37							
									89.84							89.84
29	HSY	178.50	204.00	155	173.38	5.12	30	5404	5000	25.5	4.98	-21	772	14%		
									178.36						180.18	
						2.9%			28						1.0%	
									30							
									54.48							54.48
30	FB	343.74	344.57	250	326.55	17.19	15	5000	5000	0.83	0.05	-14	12	0%		
									343.74						344.16	
						5.0%			15						0.1%	
									50							
									21.00							21.00
31	DGX	148.58	172.30	270	140.41	8.17	33	4910	5000	23.72	2.90	-14	784	16%		
									148.56						149.38	
						5.5%			34						0.6%	
									33							
									27.06							27.06
32	NFLX	692.61	747.41	250	657.98	34.63	7	5000	5000	54.8	1.58	-14	396	8%		
									695.06						687.22	
						5.0%			7						-1.1%	
									7							
									-54.88							-54.88
33	AAPL	152.60	157.03	75	151.23	1.37	55	8354	5000	4.43	3.23	-14	243	3%		
									152.60						153.63	
					SAR				33						0.7%	
						0.9%			25							
									25.80							25.80
34	AAPL	152.60	157.03	75	151.23	1.37	55	8354	5000	4.43	3.23	-7	243	3%		
									152.60						153.90	
					SAR				33						0.9%	
						0.9%			25							
									32.50							32.50
34	NFLX	691.25	700.00	250	656.69	34.56	7	5000	13700	8.75	0.25	-14	63	1%		
									690.90						692.76	
						5.0%			20						0.3%	
									19							
									35.30							35.30
36	IQV	265.51	290.93	250	245.63	19.88	13	3339	5000	25.42	1.28	-14	320	10%		
									269.31						270.58	
						7.5%			19						0.5%	
									10							
									12.70							12.70
37	AAPL	155.05	176.28	250	146.37	8.68	29	4466	5000	21.23	2.45	-14	611	14%		
									155.05						156.68	
						5.6%			32						1.1%	
									30							
									48.90							48.90
38	ADBE	674.62	787.87	250	644.73	29.89	8	5643	5000	113.25	3.79	-14	947	17%		
									674.97						688.54	
						4.4%			7						2.0%	
									8							
									108.56							108.56

TYPICAL – TRADE RECORDS

		-511.00	1724.94
	Commission Total	-511.00	
	Equity Total	1724.94	
	Gain/Loss	**1213.94**	
R = 250	Total R	4.86	

TYPICAL – FUNDAMENTALS ANALYSIS

Earnings



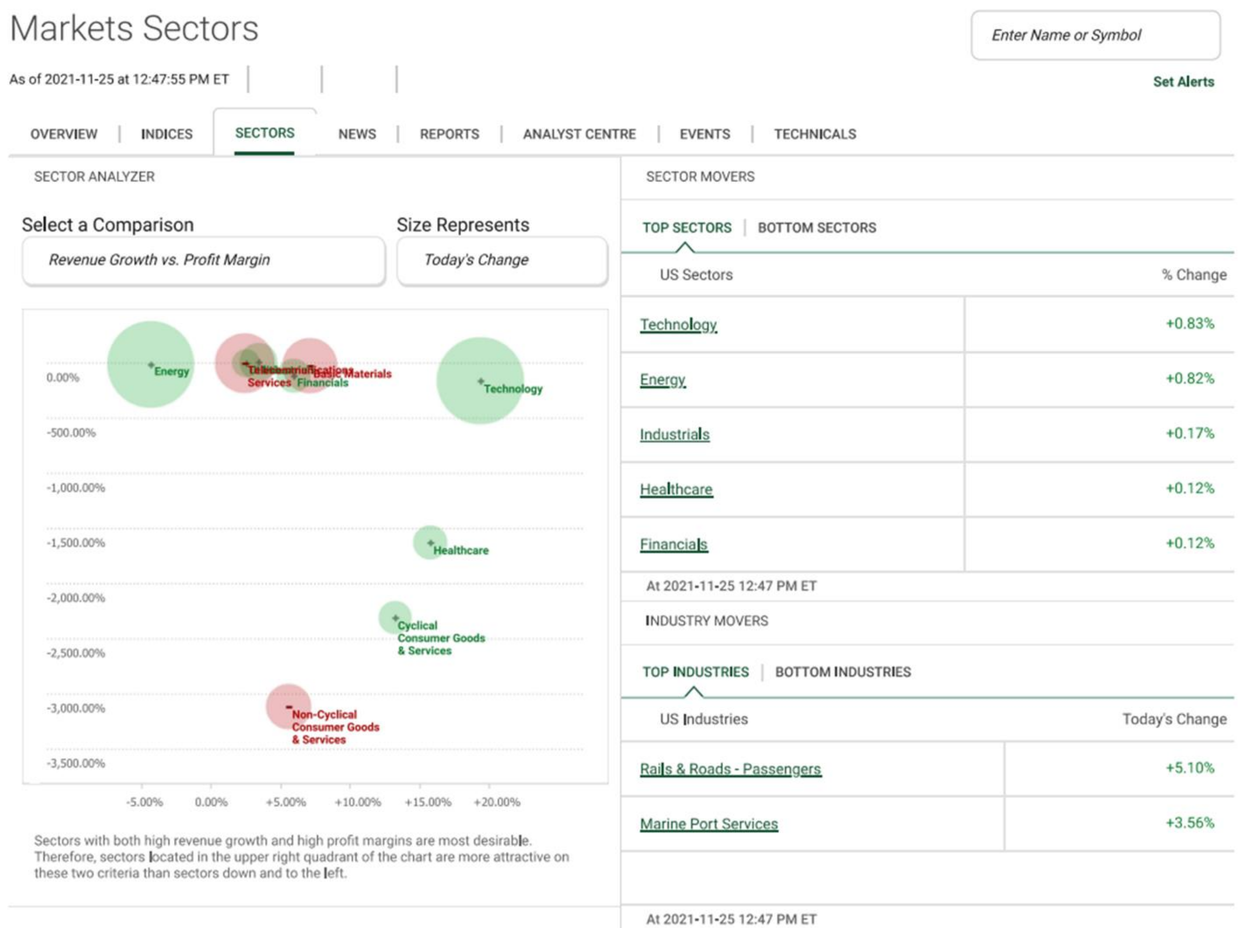

Earnings, Estimates & Ratios

Earnings	2018-11-29	2019-11-28	2020-11-26	2021-11-26	2022-11-26	2023-11-26
Earnings per Share USD	5.58	6.01	10.85	12.47	14.23	16.66
Earnings change comp. with prev. year	65.00	7.80	80.50	15.00	14.10	17.10
Earnings Yield in %	2.20	1.90	1.60	1.90	2.20	2.50
Price-Earnings Ratio	11/30/2018	11/29/2019	11/27/2020	11/27/2021	11/27/2022	11/27/2023
Price-Earning Ratio (PER)	56.03	40.71	60.63	52.73	46.21	39.48
Price-Earnings-Growth Ratio (PEG)	0.69	6.60	0.75	3.52	3.28	2.31
Cash Flow	11/30/2018	11/29/2019	11/27/2020	11/27/2021	11/27/2022	11/27/2023
Cash Flow per Share in USD	8.09	8.99	11.81	14.55	16.78	19.86
Price/Cash Flow Ratio (P/CF)	31.01	34.43	40.39	45.20	39.20	33.11
Dividend	11/30/2018	11/29/2019	11/27/2020	11/27/2021	11/27/2022	11/27/2023
Dividend in USD	0.00	0.00	-	0.00	0.00	0.00
Dividend Yield in %	-	-	-	-	-	-
Market	11/30/2018	11/29/2019	11/27/2020	11/27/2021	11/27/2022	11/27/2023
BVPS in USD	19.20	21.83	27.69	31.45	38.12	46.64
Book Value in mn USD	9,362.12	10,530.15	13,264.00	-	-	-
Price-to-book Ratio	13.07	14.18	15.94	20.91	17.25	14.10

TYPICAL – FUNDAMENTALS ANALYSIS

Earnings	2018-11-29	2019-11-28	2020-11-26	2021-11-26	2022-11-26	2023-11-26
(P/B)	13.07	14.18	15.94	20.91	17.25	14.10
Market Value in USD	128,899.23	167,130.50	216,049.30	-	-	-
Market-to-book Ratio (Tobi's Q)	13.77	15.87	16.29	-	-	-
EBITDA in mn USD	3,186.86	4,175.69	5,180.00	7,946.93	9,027.57	10,357.08
Market Value to EBITDA Ratio	40.45	40.02	41.71	-	-	-
EBITDA to Sale (EBITDA margin)	0.35	0.37	0.40	-	-	-
*Estimation	-	-	-	-	-	-

TYPICAL – SECTOR GROWTH PERFORMANCE ANALYSIS



TYPICAL – SECTOR GROWTH PERFORMANCE ANALYSIS

SECTOR PERFORMANCE

OVERVIEW | PERFORMANCE

Sector Name	Avg Market Cap	P/E Ratio (TTM)	EPS Growth (5yr)	Dividend Yield
Cyclical Consumer Goods &	534.3B	99.96x	+31.88%	+1.64%
Technology	961.4B	63.37x	+24.22%	+0.97%
Basic Materials	54.6B	36.07x	+12.24%	+4.62%
Healthcare	140.5B	90.22x	+12.00%	+2.18%
Telecommunications	100.0B	42.36x	+11.22%	+5.00%
Industrials	110.9B	81.21x	+9.28%	+1.56%
Non-Cyclical Consumer	142.7B	34.74x	+5.48%	+2.72%
Financials	93.9B	28.03x	+4.95%	+2.77%
Utilities	47.7B	33.90x	+0.05%	+3.44%
Energy	90.1B	28.56x	-3.63%	+4.92%

At 2021-11-25 12:54 PM ET

US Industries	Today's Change
Computer Hardware	+3.45%
Marine Transportation	+1.93%
Entertainment Production	+1.89%

At 2021-11-25 12:47 PM ET

INDUSTRY STRATEGIES

HIGH DIVIDEND | EPS GROWTH | PRICE DISCOUNT/BV

Industries that have maintained their dividend in the face of falling share price lead to high dividend yields. Attention should be paid to the sustainability of these future payments. Generally industries with high dividend yields are mature, stable industries.

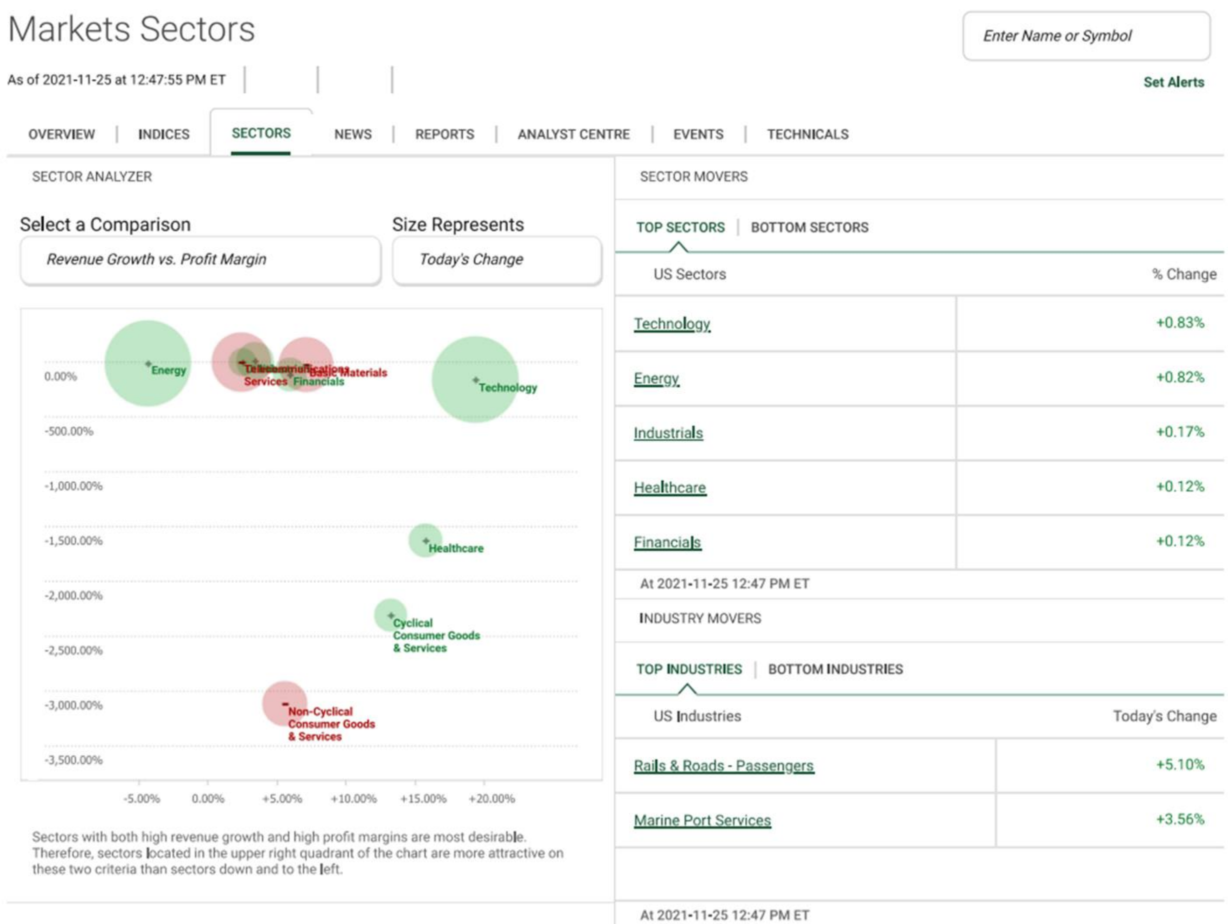
US Industries	Dividend Yield
Marine Transportation	10.29%
Mining & Metals - Specialty	9.55%
Retail - Catalog & Internet Order	9.39%
Steel	8.39%
Tobacco	7.14%

At 2021-11-25 12:47 PM ET

K=Thousands, M=Millions, B=Billions, TTM=Trailing 12 Month, MRQ=Most Recent Quarter, FYR=Fiscal Year End, NM=Not Meaningful, NA=Not Available

GAAP = Generally Accepted Accounting Principles used in Financial Statements issued by the company, Non-GAAP = Adjusted Operating Earnings or Revenue used in comparison to Analyst Estimates. Adjustments are typically one-time gains or losses

TYPICAL – SECTOR PERFORMANCE ANALYSIS



TYPICAL – SECTOR PERFORMANCE ANALYSIS

SECTOR PERFORMANCE

OVERVIEW | PERFORMANCE

Sector Name	Today	1 Week	1 Month	1 Year
Energy	+0.82%	-0.01%	-2.86%	+56.24%
Cyclical Consumer Goods &	+0.11%	-0.27%	+7.79%	+46.72%
Technology	+0.83%	-1.35%	+4.54%	+45.76%
Financials	+0.12%	+0.18%	-0.79%	+43.91%
Basic Materials	-0.40%	+0.25%	+1.89%	+30.66%
Industrials	+0.17%	-0.39%	+1.71%	+30.12%
Healthcare	+0.12%	-1.64%	-0.23%	+29.03%
Non-Cyclical Consumer Goods	-0.27%	-0.12%	+1.06%	+11.30%
Utilities	+0.04%	+0.50%	+0.93%	+8.26%
Telecommunications Services	-0.46%	-0.88%	-1.70%	+0.73%

At 2021-11-25 12:48 PM ET

US Industries	Today's Change
Computer Hardware	+3.45%
Marine Transportation	+1.93%
Entertainment Production	+1.89%

At 2021-11-25 12:47 PM ET

INDUSTRY STRATEGIES

HIGH DIVIDEND | EPS GROWTH | PRICE DISCOUNT/BV

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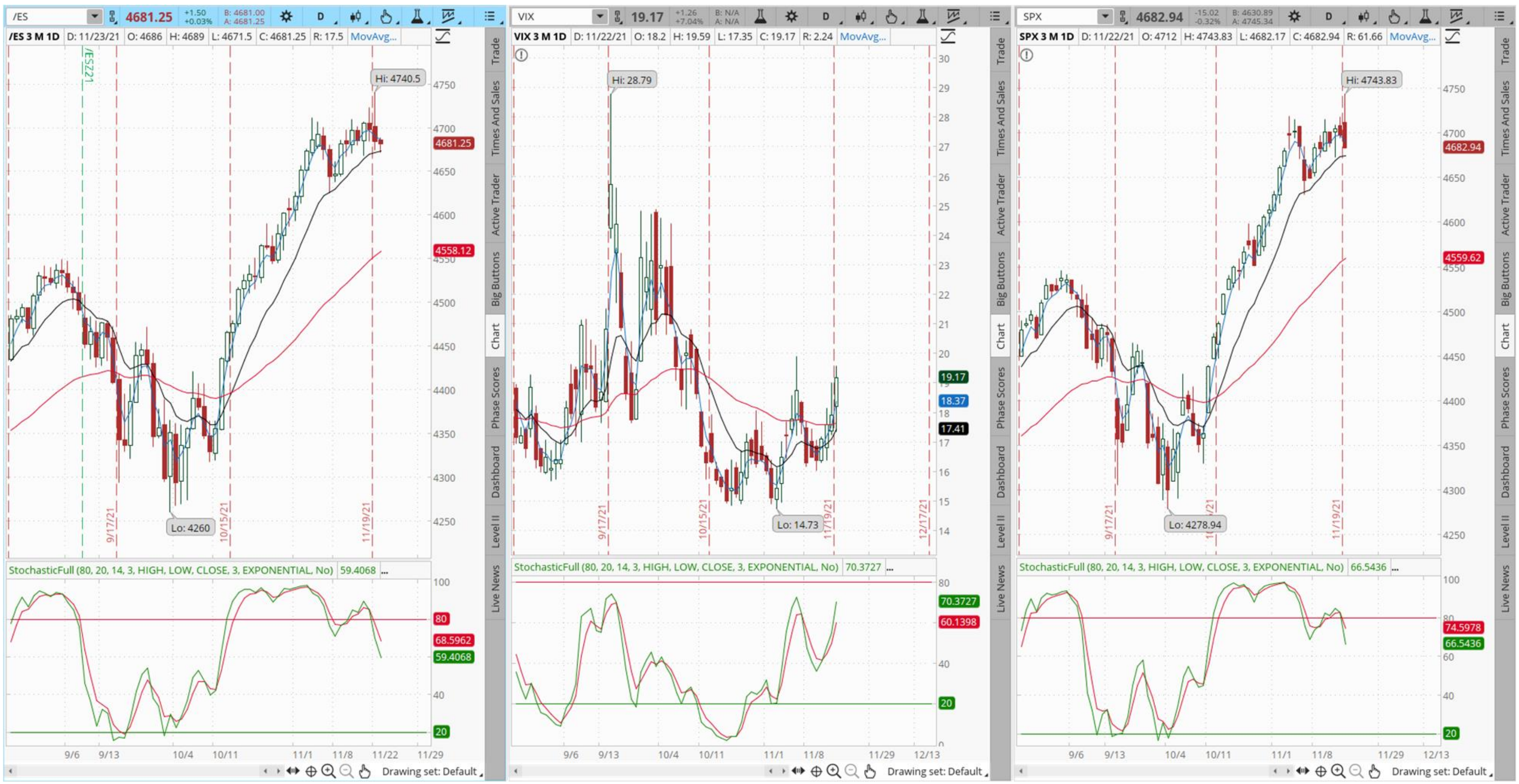
TYPICAL – MARKET ANALYSIS, DOW FUTURES

TYPICAL - MARKET ANALYSIS. NASDAQ FUTURES

TYPICAL – MARKET ANALYSIS , S&P 500 FUTURES

TYPICAL ANALYSIS – S&P 500 FUTURES, VIX AND S&P 500 INDEX



SAMPLE STOCK TRADING PLAN
INTERMEDIATE-TERM SWING TRADING

NOTES

Notes

TYPICAL – RECENT CHART PATTERN/BASE BREAKOUT

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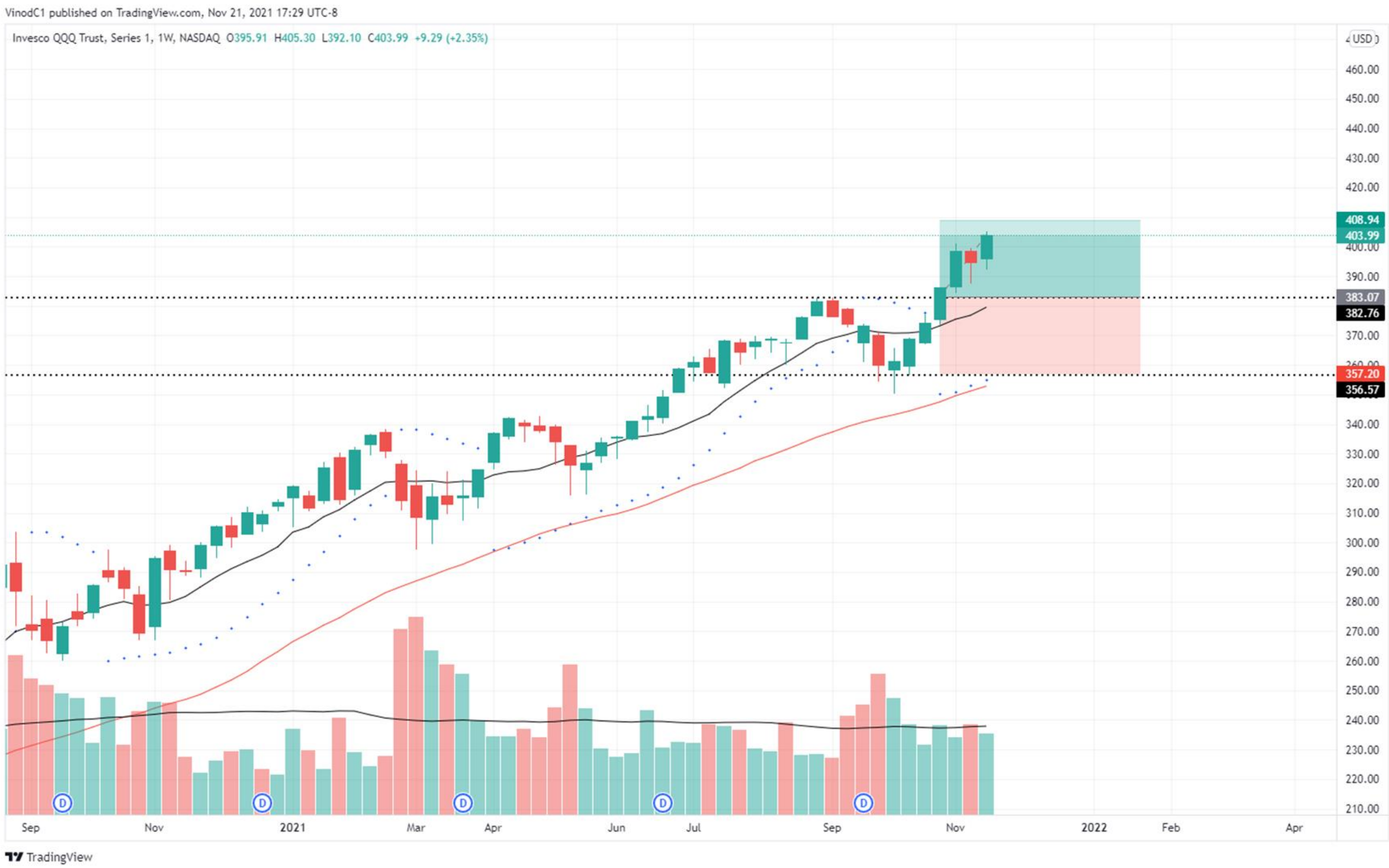

TYPICAL – RECENT CHART PATTERN/BASE BREAKOUT

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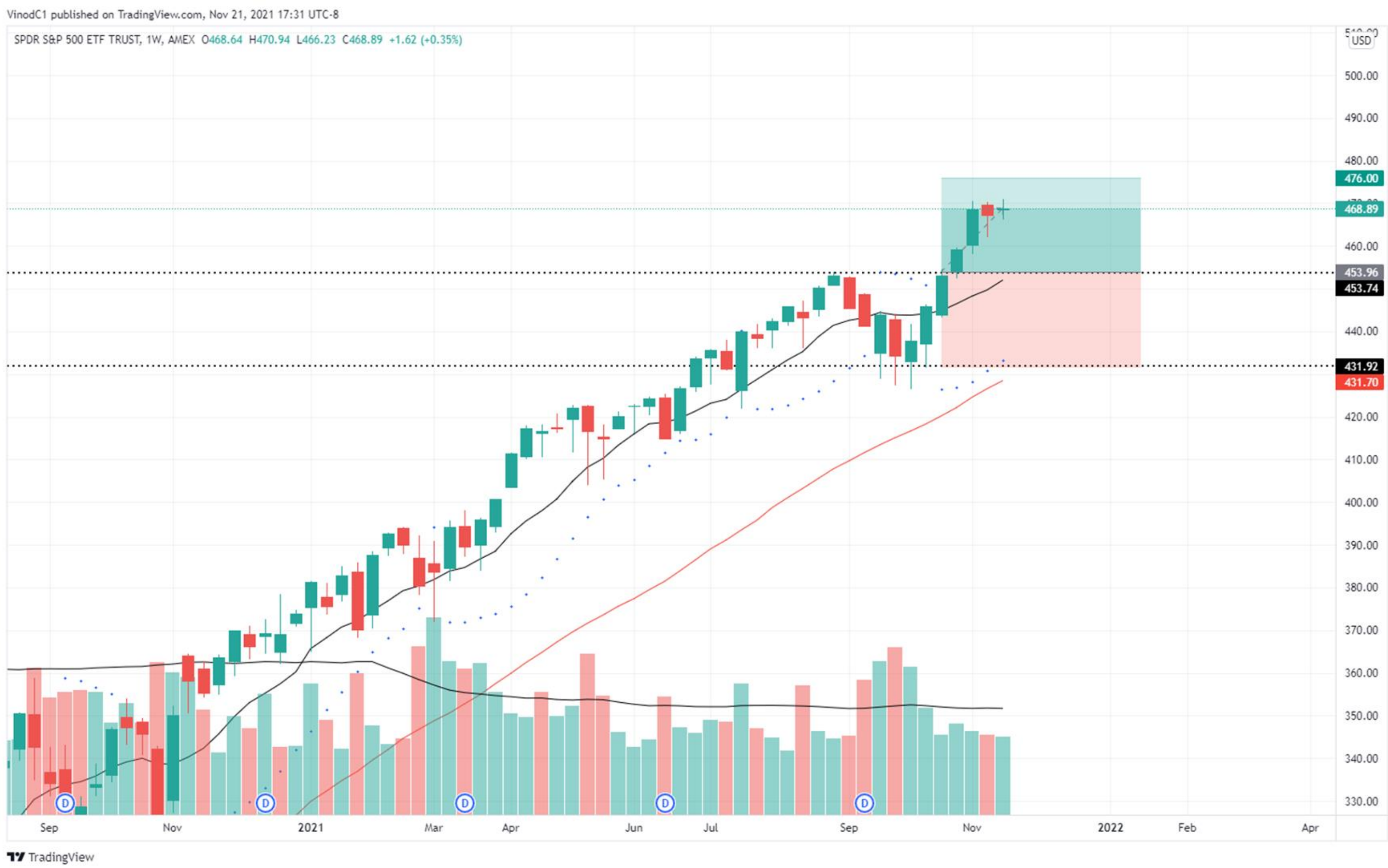

TYPICAL – RECENT CHART PATTERN/BASE BREAKOUT

TYPICAL – CURRENT CHART PATTERN/BASE BREAKOUT

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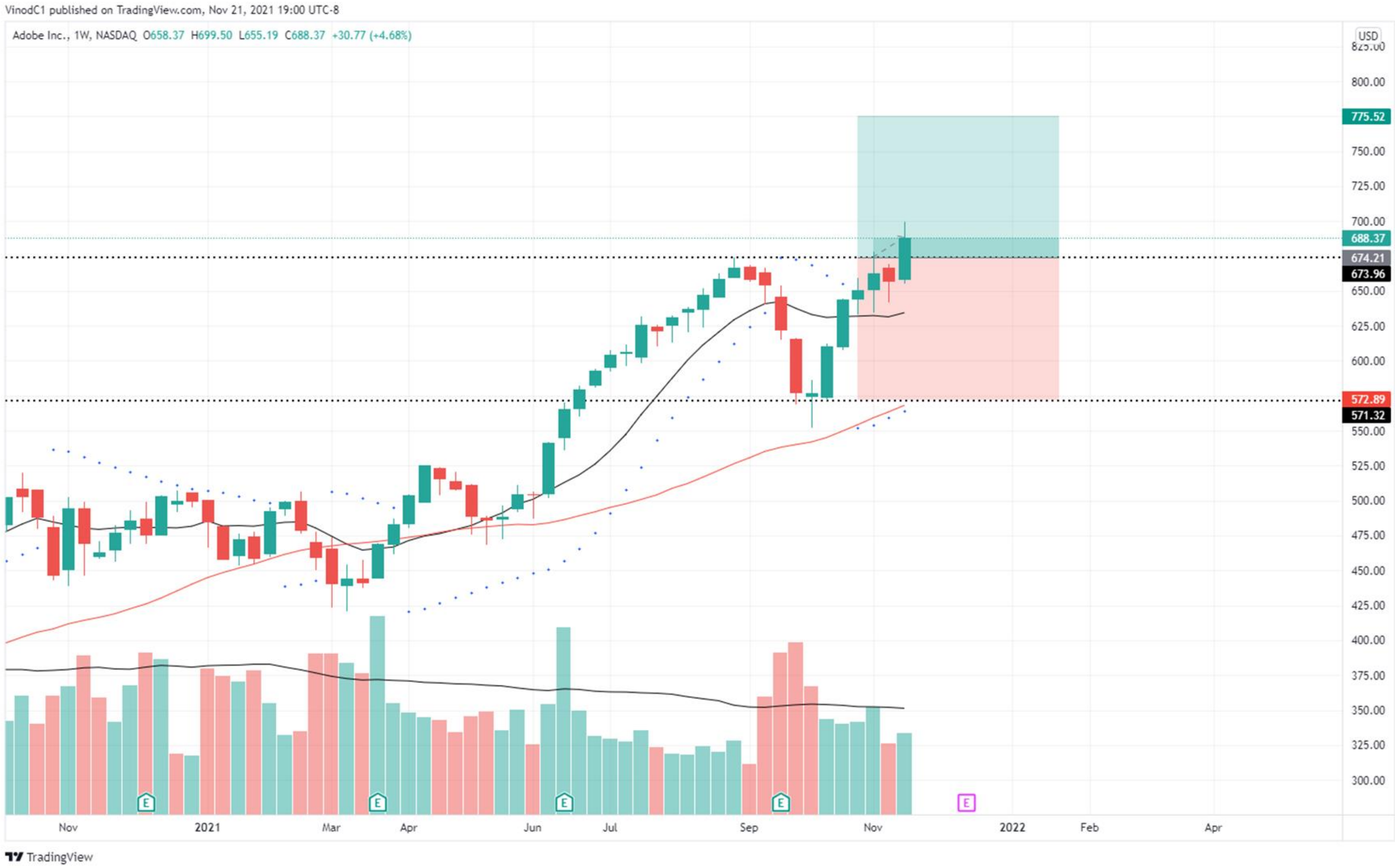

TYPICAL – CURRENT CHART PATTERN/BASE BREAKOUT

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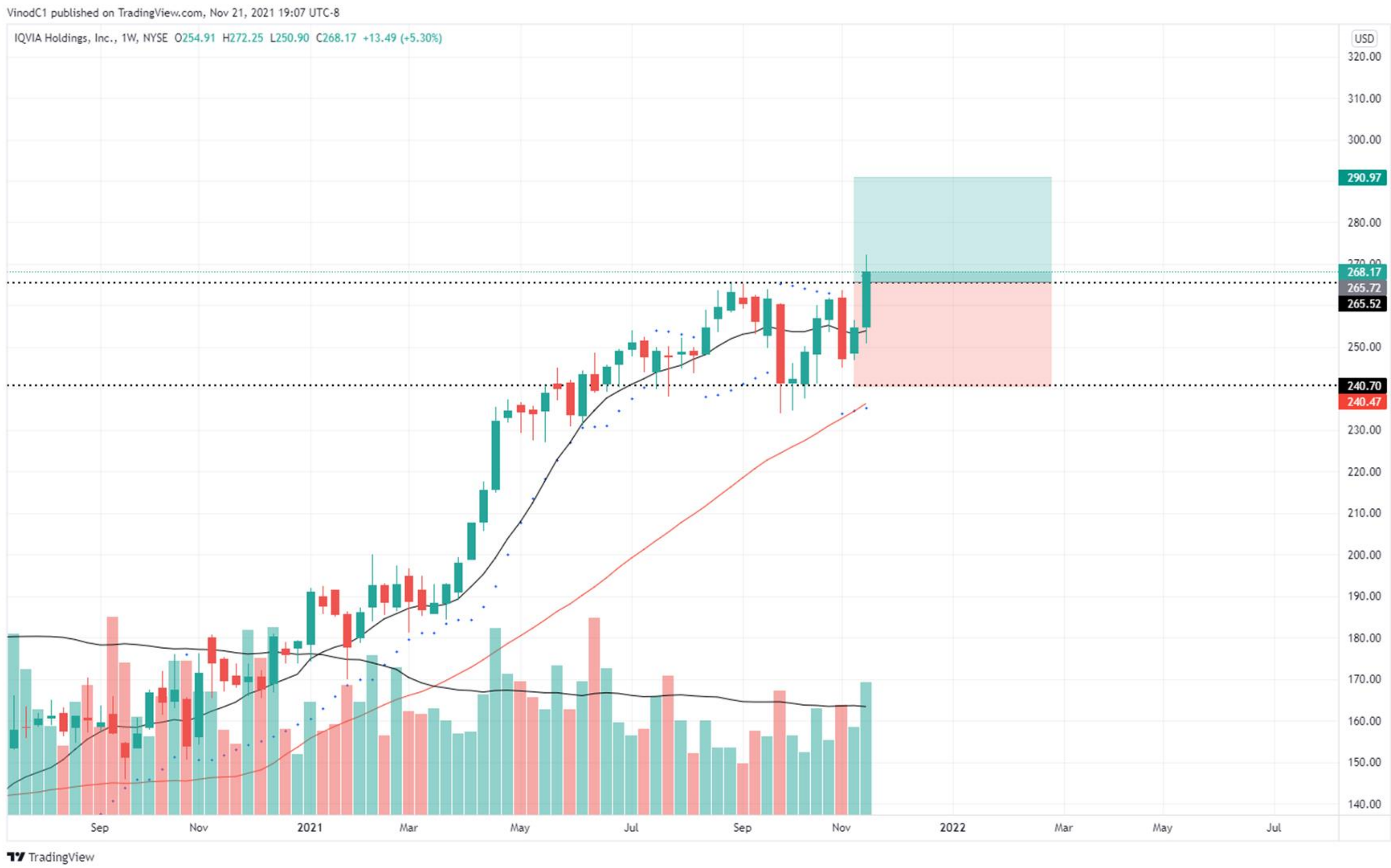


TYPICAL – CURRENT CHART PATTERN/BASE BREAKOUT

TYPICAL – POTENTIAL CHART PATTERN/BASE BREAKOUT

TYPICAL – POTENTIAL CHART PATTERN/BASE BREAKOUT

VinodC1 published on TradingView.com, Nov 21, 2021 19:19 UTC-8

TradingView

TYPICAL – POTENTIAL CHART PATTERN/BASE BREAKOUT

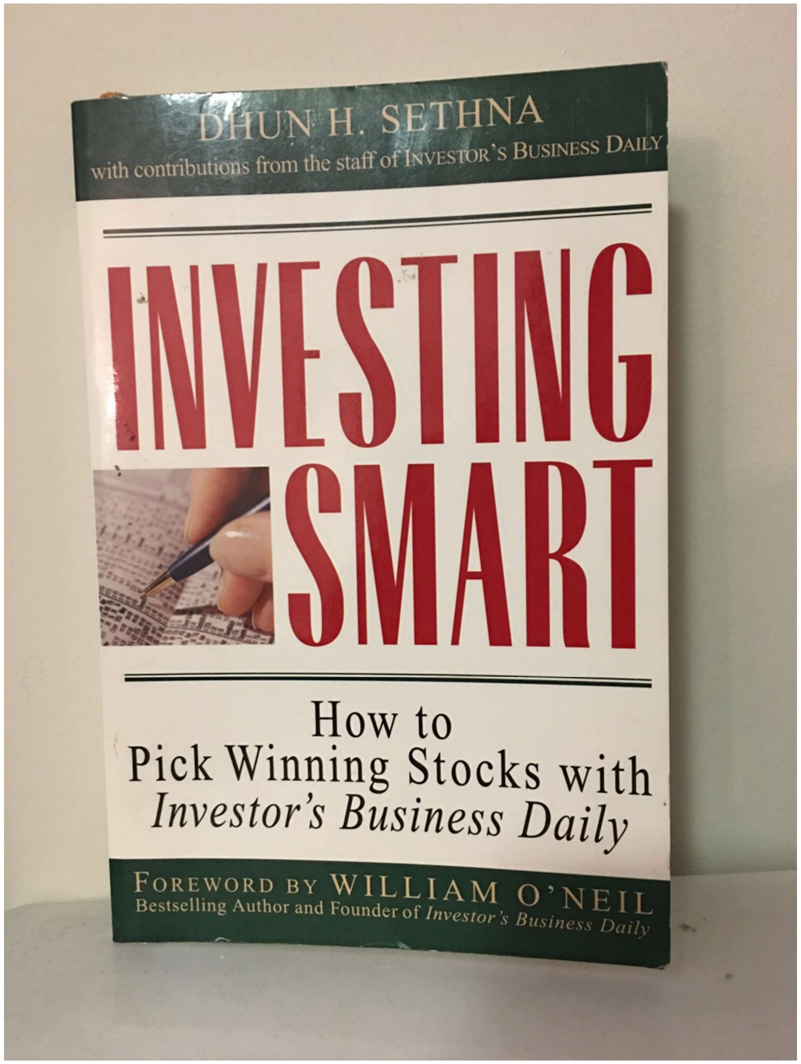
TYPICAL – POTENTIAL CHART PATTERN/BASE BREAKOUT

TYPICAL – POTENTIAL CHART PATTERN/BASE BREAKOUT

VinodC1 published on TradingView.com, Nov 21, 2021 19:21 UTC-8

TYPICAL – POTENTIAL CHART PATTERN/BASE BREAKOUT

1997 PUBLICATION – EARLY CHART PATTERN TRADING REFERENCE BOOK
FOREWORD BY FOUNDER OF INVESTOR'S BUSINESS DAILY (IBD)



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INVESTOR'S BUSINESS DAILY®

Overview of Bases - Page 1

Bases

As a stock gains over the course of its price run, it may periodically pull back to form areas of price consolidations — also known as bases and chart patterns.

That happens as some large investors sell shares, taking profits after a run-up.

Each base is important to watch for since it's where the stock typically takes a "breather" before resuming its climb, using the base as a springboard to climb higher as it resumes its journey up the chart.

Bases are precursors to a winning stock's next big move. They're like stepping stones — resting areas where the stock pauses after climbing higher for a few weeks or months. The base is an opportunity for the stock to regain its strength and launch the next stage of its climb.

Below is a simplified version of what that looks like.

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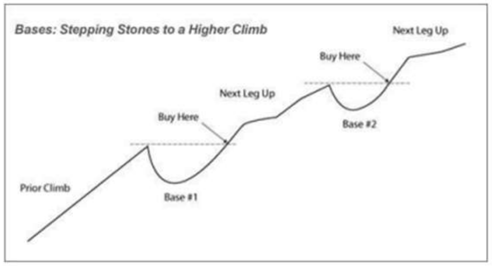


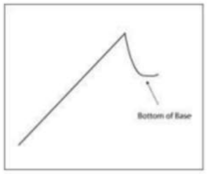
Use Bases to Reduce Risk, Reap Rewards

Bases and their related **buy points** help you identify the best time to get into a stock. Think of a chart pattern like a launching pad: It's the starting point for the stock's next big move up. The stock shakes off a prior decline, finds a "floor" of support, then punches through its former "ceiling" of resistance. That's a sign of strength and an indication that a new upward climb has begun. By waiting for that to happen *before* you buy, you reduce your risk and still leave plenty of potential for big profits.

Here's how that works.

Left Side of Base: The Sell-Off

Bases begin after the stock has been climbing higher for a while (typically a few weeks or months), then begins to decline. That usually means some fund managers and other institutional investors are cashing in the profits they made in the prior run-up. It often happens as the general market starts to slip into a downtrend. The sell-off creates the left side of the pattern.



Bottom of Base: A "Floor" of Support Forms as Selling Subsides

The bleeding stops and a bottom begins to form once large investors stop selling aggressively and begin buying shares again. But at this point, it's too early to tell if the stock has truly regained its strength or will continue to head lower.

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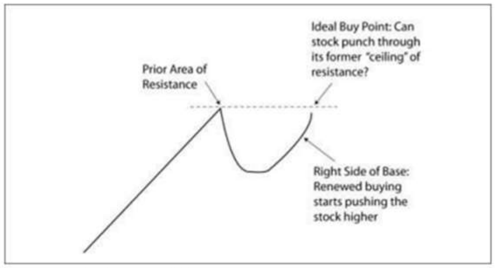
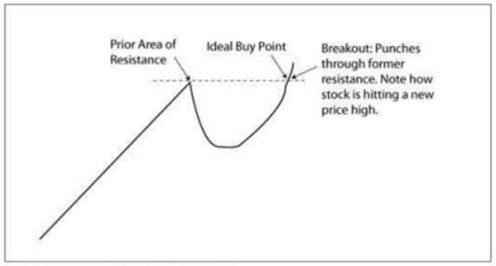
Right Side of Base: Institutional Buying Returns

The right side of a pattern forms when large investors start scooping up shares again. That pushes the stock higher and gets it closer to the next crucial test area: the ideal buy point or prior area of resistance. But stay patient and don't predict what will happen next. Make the stock prove its mettle by breaking past its buy point on heavy volume.



Buy Point: Breaks Through Former "Ceiling" of Resistance

The ideal buy point in a chart pattern is based on the prior area of resistance. Make sure the stock can punch through that ceiling on heavy volume before you invest. That significantly reduces your risk and still leaves plenty of opportunity for big gains.



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Look for New Highs

As we saw earlier, the N in CAN SLIM stands for a "new" product or industry trend, but it also refers to a new 52-week price high.

For each of the telltale patterns — cup-with-handle, double bottom and flat base — a key requirement is that the stock be at or near a new high as it breaks out. (Look at the example of a Buy Point, above. Note how the buy point and breakout are in new high territory.) That's a sign of strength and an important reminder of this historical market fact:

- Stocks hitting new price ***highs*** tend to ***go higher***.
- Stocks hitting new price ***lows*** tend to ***go lower***.

So avoid stocks trending down and hitting new lows. Instead, focus on stocks showing strength as they climb into new high ground and break out of a sound chart pattern.

Why Not Buy at the Bottom of the Base?

Hindsight is indeed 20-20. *After* a stock has completed the pattern, it's easy to *retroactively* say you would have made more money by buying at the bottom of the base. But when the pattern is still forming, it's too early to tell if the trend has truly changed, or if the stock will continue to head even lower. If you try to buy *before* the pattern is complete, you're just taking on unnecessary risk.

Instead, wait for the stock to finish the base and break out on heavy volume. That *dramatically* reduces your risk and still leaves plenty of potential for major gains.

Managing Expectations

Successful investing starts with keeping the odds in your favor. Year after year, history shows the best way to do that is to buy stocks with strong fundamentals as they break out of a proper chart pattern during a market uptrend. That helps *significantly* reduce your risk and increase your profits.

But another key to successful investing is to manage your expectations. Understand that not all bases lead to big gains. Sometimes a stock will break out, then reverse course and head lower again. That's why you must always follow sound sell rules if a trade does not work out as planned. Staying disciplined is the key to long-term success: Use chart patterns to buy at the right time and also have defensive rules to both lock in profits and protect your portfolio.

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INVESTOR'S BUSINESS DAILY®

Overview of Bases - Page 2

Market Cycles and Bases

To understand when and why bases occur and how to profit from them, you need to recognize how closely they're tied to the cycles of the general market.

- **Most Bases Form During a Market Correction**

  As we saw in the section on Market Direction, when the overall market falls into a correction, it takes 3 out of 4 stocks down with it. So when an uptrend rolls over into a downtrend, that's when most stocks pull back to form a new base.

  Tip: Most stocks begin forming a new base after rising 20% to 25% from the **buy point** in the prior pattern. And that typically happens around the same time the general market uptrend begins to slip into a correction. That's why following the 20% to 25% sell rule can help you lock in your profits before the stock begins to sell off and form a new chart pattern.

- **Bases Mirror the Depth and Length of the General Market Downtrend**

  If the overall market correction is short and shallow, you'll see a lot of similarly short and shallow bases among leading stocks. During intermediate declines in the general market, growth stocks often form cup bases that correct 1 ½ to 2 ½ times the market averages. And in a more severe correction that is long and deep, the patterns individual stocks form will mirror that action.

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So it's not unusual to see a stock build a long and deep base in a steep market correction. But if a stock forms a long and deep base during a much milder, overall market downturn, beware. That usually indicates something is wrong with the stock itself, and the selling is not just a normal reaction to weakness in the overall market.

- **The Best Stocks Break Out of Bases at the Start of a New Market Uptrend**

  When the market rebounds, the cycle begins all over again: Stocks break out of the bases they formed during the past correction and move higher.

- **To Buy Stocks at the Right Time, Stay in Sync with the Market Cycle**

  The big money is made in the early stages of a new uptrend. And to capture those gains, you need to do your homework during a correction and identify stocks forming the telltale bases that precede a new price move.

How to Count Bases & Why You Should

It's a good idea to track the number of bases a stock has formed during its current run-up. As a rule of thumb, try to buy stocks that are breaking out of the first or second base of their run. Late-stage bases are riskier. Late-stage means a base that's No. 3 or higher in the base count.

Why is it important to spot a late-stage base?

After forming a third or a fourth base, most growth stocks can't rally much further, if at all. What usually follows is a long, steep slide. After a stock has had a large advance without a major correction, the probabilities are greater that institutional investors will cash in their profits and push the price into a serious decline.

By the time a stock forms a late-stage base it's usually widely known to investors and running short on fresh buyers. In addition, the late-stage base tends to have unsteady price swings, bouts of strong selling or other flaws. It's the chart's way of telling you that the best buying opportunities are gone.

Late-stage patterns can work and sometimes do lead to nice gains, but you should understand that they involve more risk. If you buy a stock on a late-stage breakout, be sure to cut your losses quickly if the stock fails to gain traction and begins to head south.

Counting bases is not difficult, and with a little practice, you'll get the hang of it.

To count how many bases a stock has formed, take a look at its weekly chart:

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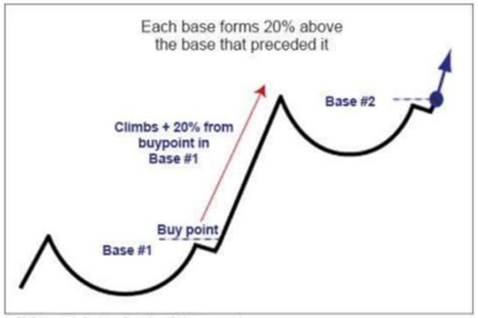
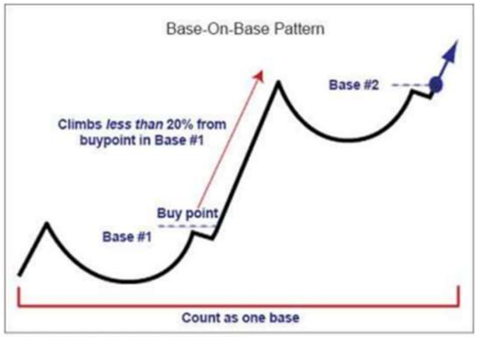
Generally do not count bases for stocks until company quarterly earnings and sales start growing by at least 25%.Each base should form at least 20% above the buy point of the base that preceded it.

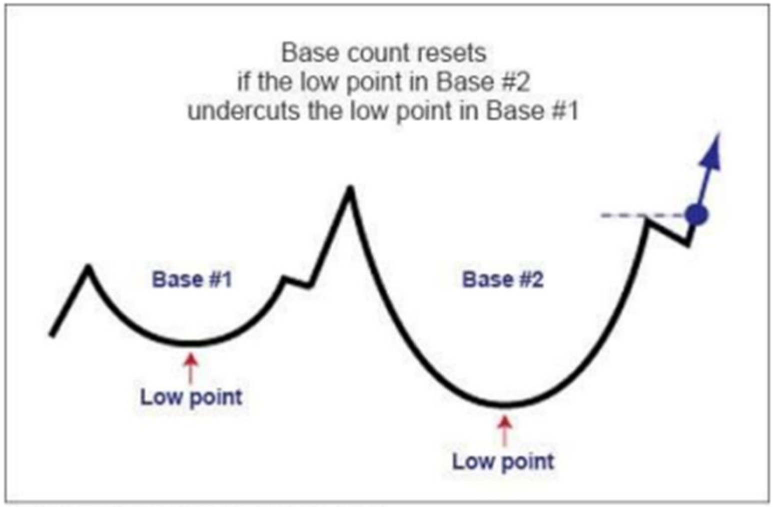


If a stock advances less than 20%, then forms another base, it's all counted as one consolidation called a **base-on-base**. The buy point is figured from the current, most recent pattern.



Bear markets reset the base count back to zero for all stocks, clearing the path for a new bull market, with fresh leadership. So start the count with the first break out from a base after a bear market has ended.

A stock will also reset its base count if its price drops so deep that it undercuts the lowest point in the base that preceded it.



NEXT TOPIC: **The 3 Most Common and Profitable Chart Patterns**

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The Three Most Common Chart Patterns - Page 1

The 3 Most Common and Profitable Chart Patterns

At the beginning of best-selling book *How to Make Money in Stocks*, IBD Founder and Chairman William J. O'Neil shows 100 charts of the top-performing stocks over the last 100+ years. Whether it was General Motors in 1915, Coca-Cola in 1934 or Priceline.com in 2006, they all built the same types of patterns.

You'll find those same shapes today and decades from now. And by learning to spot these bases, you'll be able to get in early on the best stocks — year after year.

Start with the three most common patterns:

- Cups: **Cup-with-Handle** and Cup-without-Handle
- **Double Bottom**
- **Flat Base**

Cups: Cup-with-Handle

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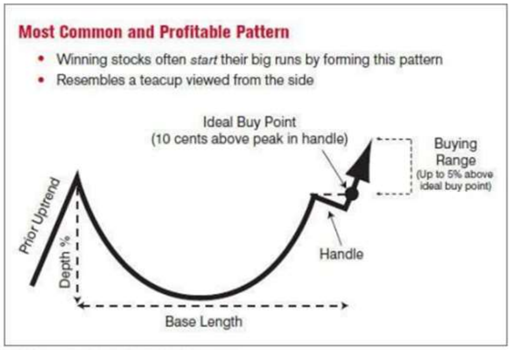

What to Look For in the Cup-with-Handle pattern.

1. **Prior uptrend of at least 30%**

   To form a proper chart pattern, you have to have a prior uptrend. The idea behind bases is that after making a decent run, the stock begins forming stepping stones as it takes a breather and prepares for an even higher climb.

2. **Base Depth: 15%-30%**

   The depth of the base — measured from the peak on the left side of the cup to the lowest point of the cup — should be between 15% and 30%. In a severe bear market, the depth may be 40% - 50%. As a general rule, look for stocks that held up relatively well during the market correction. So if one stock on your watch list dropped 35% while another's base depth is only 20%, all else being equal, the stock with the 20% decline could be forming a stronger base.

3. **Base length: At least 7 weeks**

   - The first down week in the base counts as Week #1.

   The minimum length for a cup with handle is 7 weeks, but some can last much longer — several months or even a year or more. Be wary of any pattern that has the shape of a cup with handle but is only, say, 5 weeks long. That's typically not enough time for the stock to consolidate the prior gains, and such bases have a higher chance of failing.

4. **Handle:**

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- Volume in handle should be *light* — depth of the handle should be 10%-12%, should form in *upper* half of base. Peak of handle should be within 15% of old high on left side of cup.

The handle should be a *mild* pullback on relatively *light* volume. It's a shakeout of weaker holders — those not committed to holding the stock longer term. A sharp decline of more than 12%-15% on heavy volume could indicate a more serious sell-off that might prevent the stock from launching a successful move.

The handle should form in the upper half of the base. If it begins forming too soon (i.e., in the lower half of the base), it could mean institutional buying, right now, is not as strong as it needs to be to push the stock higher.

Who are the weaker holders getting shaken out in the handle? Typically, they're investors who bought late, right at the end of the prior uptrend. (See Point 1, above). When the stock sold off to form the left side of the base, they suffered a sharp loss. Getting a profit is no longer their goal. They just hope to recoup some of their losses. So as the stock nears that old high — and the weaker holders' break-even points — they start to sell.

Here's why that shakeout is healthy: If you have a lot of weak holders in a stock, whenever the share price rises, they jump in to sell, which pushes the price back down. Once they're out of the picture, it's easier for the stock to move higher.

And what about the big investors who've been picking up shares as the stock formed the right side of the cup? They're more committed and are holding onto their shares. That's why the volume in the handle is light: Only the weaker holders are selling. The large institutional investors are sitting tight in expectation of a new upward climb.

5. **Ideal Buy Point: 10 cents above the peak in the handle**

- Buying Range: up to 5% above the ideal buy point.

If the peak in the handle is, say, 30, then you add 10 cents to get the ideal buy point of 30.10. The buying range would be from 30.10 to 31.60, 5% above the ideal buy point.

For best results, buy as close to the ideal buy point as possible. If you're not able to watch the market during the day, you can set conditional orders ahead of time. Those trades get automatically triggered if the stock hits your target purchase price. Ask your brokerage service how to set those up.

Don't Buy Extended Stocks

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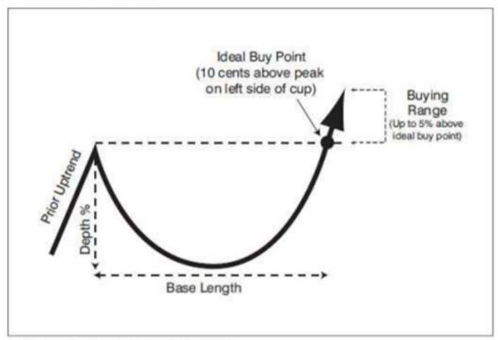
Once a stock climbs more than 5% above the ideal buy point, it's considered **extended** or beyond the proper buying range. Stocks often pull back a bit after a **breakout**. So if you buy extended, there's a higher chance you'll get **shaken out** of the stock because it triggers the 7%-8% sell rule.

6. **Volume on day of breakout: At least 40%-50% above average**

   On the day a stock breaks past its ideal buy point, volume should be at least 40%-50% higher than normal for that stock. That shows strong institutional buying. On many breakouts, you'll see volume spike 100%, 200% or more above average. Light or below-average volume could mean the price move is just a head fake, and the stock is not quite ready for a big run.

Cups: Cup-without-Handle



The cup-without-handle — also called a cup-shaped base or simply a cup — is a variation on the cup-with-handle pattern. As the name implies, it's essentially the same, except it doesn't have a handle. All the attributes, except for the buy point, are identical.

The buy point in a cup-shaped base is calculated by adding 10 cents to the peak on the left side of the cup — the most recent area of resistance.

Launching Gains from the Cup-with-Handle and Cup-without-Handle Bases

Below are examples of winning stocks that launched big runs from the cup-with-handle and cup-without-handle patterns.

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Both the daily and weekly charts are included. The weekly charts show the longer term trend, while the daily charts show the action on the actual day of the breakout. Be sure to use both! (See **How to Read Stock Charts** to learn more.)

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