



## CA Strategy of the Week Q & A *1:00 p.m. EDT - Feb. 16, 2015*



Stan Heller  
Presenter

**Learn how to Make Money with VectorVest**

**Don't miss this week's Timing & Strategy Video**

Special Presentation:

**How to Put Your  
Plan Into Action**

[CLICK HERE](#)



- *Please make sure your computer speakers are turned on to hear the audio portions of this webcast.*

# Top 5 Reasons Why You Should Have A Plan

1. You will feel more in control of every aspect of your trading.
2. You will make decisions based on rules, not emotions.
3. You will feel more confident.
4. You will make steady gains.
5. You will label yourself a success.



# Your Trading Plan

Be Sure To Write It Down

Your plan should have  
three components.



- When to Buy
- What to Buy
- When to Sell

*The faintest ink is better than  
the best memory.*



# Know When To Buy

Criteria for effective entry signals.



**Color Guard** Market Close on 2/13/2015

Date	Price	RT	BSR	MTI	Trend	Call
Feb 13	19.571 (G) ★	0.93 (Y)	0.61 (Y)	1.13	UpUp	C/Up
Feb 12	19.506 (G) ★	0.92 (Y)	0.54 (Y)	1.11	UpUp	C/Up
Feb 11	19.435 (G) ★	0.92 (Y)	0.50 (Y)	1.09	UpUp	C/Up
Feb 10	19.395 (G) ★	0.92 (Y)	0.51 (Y)	1.09	UpUp	C/Up
Feb 09	19.372 (G) ★	0.91 (Y)	0.49 (Y)	1.10	UpUp	C/Up
Feb 06	19.361 (Y)	0.91 (Y)	0.51 (Y)	1.11	UpUp	C/Up
Feb 05	19.410 (G) ★	0.92 (Y)	0.55 (Y)	1.12	UpUp	C/Up
Feb 04	19.281 (Y)	0.90 (Y)	0.49 (Y)	1.09	UpUp	C/Up
Feb 03	19.322 (G) ★	0.92 (Y)	0.52 (Y)	1.08	UpUp	C/Up
Feb 02	19.181 (G) ★	0.89 (Y)	0.43 (Y)	1.02	UpUp	C/Up
Jan 30	19.007 (Y)	0.88 (Y)	0.39 (Y)	0.97	DnDn	C/Up
Jan 29	18.955 (Y)	0.87 (R)	0.36 (R)	0.97	DnDn	C/Up

# Know Your Criteria for When to Buy



## WHAT TO BUY

1. What criteria will I use to enter a trade?
  - Ex – EPS rising, Price < Value, Price moving higher after 10AM
  - Ex – MACD crossover & Volume > AvgVol
2. How many stocks will I buy at once?
  - Ex – Two stocks per day until I reach 10 positions
3. How much will I invest in each stock?
  - Ex – I'll invest one tenth of my total capital into each.

## Before buying any stocks:

- ✓ Stock price is steadily rising & not volatile
- ✓ Company is making money and growing their earnings
- ✓ Favor undervalued stocks



# Know Your Criteria for When to Sell

◀EXIT▶

## WHEN TO SELL

1. What will trigger me to exit the market?
2. What will be my stop criteria?
  - Ex – 10% trailing stop
3. What is my profit target? What will I do when my profit target is hit?
  - Ex – 30% gain, if hit I will sell half my positions and tighten stops to 10% below current price



Consider:

1. Your STOP Criteria for Individual Stocks
2. Know your Profit Target in advance.
3. Market Timing Signals AND Market Guidance for Bull and Bear Markets

# Know the Market Cycle of Investor Emotions



# Trading Plans You Can Use As A Template

VectorVest Canada Investment Blog  
[www.vectorvest.ca/cablog](http://www.vectorvest.ca/cablog)

Markham UG's Business Plan for a Retired Couple  
Phil Thomas, Markham User Group  
Category – Portfolio Management, Retirement Planning  
Jan 20, 2015

User Group Wisdom – Sharing A Trading Plan  
Sherry Manners, Edmonton User Group  
Category – Portfolio Management, User Group Meetings  
Jan 17, 2015 (VIDEO INCLUDED)

Get your trading plan template here, courtesy EUG  
Sherry Manners, Edmonton User Group  
Category – User Group Meetings, Portfolio Management  
Jan 29, 2015

VectorVest Canada Investment Blog  
[www.vectorvest.ca/cablog](http://www.vectorvest.ca/cablog)

Managing Positions Using 3-EMA/8-EMA Crossovers  
Petra Hess, Burlington User Group  
Category – Portfolio Management, Technical Studies  
Nov 21, 2015 (VIDEO INCLUDED)

Retirees Income Portfolio Management  
Stan Heller, Consultant, VectorVest Canada  
Category – Portfolio Management  
Feb 5, 2015

US MARKET – Sure Fire Success Portfolios  
CA MARKET – Model Portfolios & Trading  
Systems

# Coming Events

## USER GROUP MEETINGS (Agendas – VIEWS Tab Every Friday)

**Kitchener – Tuesday, Feb 17 at 6:30 p.m.**

Heidelberg Inn, 3006 Lobsinger Line (RR 15)

**Cobourg – Tuesday, Feb 18 at 7:00 p.m.**

Cat & The Fiddle Pub, 38 Covert St (Upstairs)

**Red Deer – Thursday, Feb 19 at 6:00 p.m.**

Red Deer Lodge, 4311 49<sup>th</sup> Ave.

**Victoria – Thursday, Feb 19 at 7:00 p.m.**

Beacon Manor, 20 Douglas Street, across from Terry Fox Memorial

**Mississauga – Saturday, Feb 21 at 8:15 p.m.**

Frank McKechnie Community Centre, 310 Bristol Rd East

**Lethbridge – Saturday, Feb 28 at 10:00 a.m. (Afternoon session: 1:00 p.m.)**

University of Lethbridge, Markin Hall, Room 2044, 2<sup>nd</sup> Floor

**Kingston – Monday, March 9 at 6:30 p.m.**

435 Davis Drive, 2<sup>nd</sup> Floor

**Kelowna – March 12 at 5:00 p.m.**

Dakotas Sports Bar and Grille, 1574 Harvey

Investment BLOG:

[www.vectorvest.ca/cablog](http://www.vectorvest.ca/cablog)

### NEW BLOG POSTS:

- Energy Sector Update – Is the rotation back into Petroleum underway?
- Don's Option Trade Ideas - Emera
- How to Run a Manual Backtest

**Wednesday, Feb 19**

CA Colour Guard Report  
(BLOG - 6:30 p.m. EST)

# Coming Events

## Stock Market Investing Basics

Stock Analysis and Portfolio Management  
Simplified with VectorVest



**FREE Workshop**

Wednesday, February 25

6:30 – 8:30 p.m.

Crowne Plaza Montreal Airport  
Montreal, QC

1-800-231-0110 to Register

## Turn Your Portfolio Into an ATM!

Intermediate Options Course - Level II

2 Free  
Gifts

Free Add-On Module

Options Analyzer  
(\$495 Value)

Free Book

The Options Playbook  
(\$35 Value)



Thursday, February 26

6:30 – 8:30 p.m.

Crowne Plaza Montreal Airport  
Montreal, QC

1-800-231-0110 to Register

## THE SECRET TO MAKING MONEY IN 2015



Sign up for a FREE Sure-Fire Success™ Performance  
Guarantee at the seminar (U.S. portfolio only).

**2-Day Investment Seminar**

FRI-SAT, February 27,28

9:00 a.m. – 4:00 p.m.

Crowne Plaza Montreal Airport  
Montreal, QC

1-800-231-0110 to Register

For More Information:  
[www.vectorvest.ca/Events](http://www.vectorvest.ca/Events)



# REFERRAL REWARDS OFFER



VectorVest pays you for referrals that help our business grow!

We want to say THANK YOU for helping us grow by continuing to introduce VectorVest to friends and family. Investing is more fun and profitable when you bring in other self-investors to share ideas and knowledge.

When a friend takes a 5-week trial for \$9.95, you will receive 1-month free!

## Referral Rewards!

Refer 1 friend – Get 1 month free  
Refer 2 friends – Get 2 months free  
Refer 3 friends – Get 3 months free  
Refer 4 friends – Get 4 months free  
Refer 5 friends – Get 5 months free  
Refer 6 friends – Get 6 months free  
Refer 7 friends – Get 7 months free  
Refer 8 friends – Get 8 months free  
Refer 9 friends – Get 9 months free  
Refer 10 friends – Get 10 months free  
Refer 11 friends – Get 11 months free

**12 FRIENDS = 1 YEAR  
FREE VECTORVEST**



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**Questions: [stan.heller@vectorvest.ca](mailto:stan.heller@vectorvest.ca)**