

Disclaimer

- Today's webinar is for educational purposes only.
- Nothing in today's presentation should be considered a recommendation to buy or sell any security.
- All stocks and options shown are examples only
- Any pricing or potential profitability shown does not take into account your trade size, brokerage commissions or taxes which will affect actual investment returns.
- Stocks and options involve risk and are not suitable for all investors and investing in options carries substantial risk.
- Past stock or option performance is no guarantee of future price appreciation or depreciation.
- Prior to buying or selling options, a person must receive a copy of Characteristics and Risks of Standardized Options available at: <http://www.cboe.com/Resources/Intro.aspx>.

InvestorsObserver Workshop

InvestorsObserver Workshop

- Charts
- What Else is Happening?
- Hot Right Now
- Member-driven content: Questions, site demonstrations, etc.
 - Can prepare slides for questions submitted ahead of time: Mention “workshop”

S&P 500



S&P 500
One Year

NASDAQ



Nasdaq
One Year

Russell 2000



Russell 2000
One Year

S&P 500 vs. Equal Weight

One Year



Growth vs. Value

VTV vs. VUG One year



Hot Right Now

- Energy
 - Thermal Coal
 - Oil & Gas Midstream
 - Oil & Gas Drilling
- Utilities
 - Independent Power Producers
 - Regulated Electric
 - Regulated Gas
- Real Estate
 - REIT - Hotel & Motel
 - REIT - Retail
 - REIT - Specialty
- Industrials
 - Infrastructure Operations
 - Airports & Air Services
 - Uranium
- Consumer Defensive
 - Confections
 - Food Distribution
 - Grocery Stores

What Else is Going On?

- Interest Rates / Inflation / Federal Reserve
 - No one knows
 - Inflation data looked “good” this morning
 - Econ data giving the Fed more room to raise
 - Job market looks good
 - Financial conditions loosening
 - Big drop in energy prices, could see a surge in winter
- Recession?
 - Two quarters of negative GDP...
 - Job market, consumer spending, other indicators point to strongish economy
 - If you want to call that a “recession” it seems to make the word less useful
 - Some talk of “labor hoarding” which is companies being overstaffed for demand
 - Suggests expectation is for a quick recovery from any weakness
 - Some regular hoarding also happening
 - Lessons of supply chain crisis are to have reserves of things you need, lessen reliance on “just in time”
 - This makes companies somewhat less profitable, but more resilient.
 - Recent talk of “hard-hard landing” vs. “soft-hard landing”
- Earnings
 - Mostly good, lots of companies had lowered the bar.

Questions?

How do i get started? How do I watch the stocks I buy?

– Kenneth

- Getting Started:
 - Buy an index fund
 - Instant diversification. Market returns.
 - What do you like or what are you interested in?
 - Start small, don't invest money you can't afford to lose
 - Ease into things. Get a feel for how stocks move.
 - Figure out your strategy and goals
 - Why are you investing?
 - When do you think you'll need the money?
 - How much time do you want to spend?

Questions?

How do i get started? How do I watch the stocks I buy?

– Kenneth

- Monitoring a Portfolio:
 - Remember your goals/plan
 - Why did you buy this stock?
 - Are those reasons still valid?
 - Risk allocation
 - Did you hit a homerun?
 - Consider trimming large, risky positions
 - Put those profits into safer assets
 - Periodic rebalancing
 - Even without homeruns, some positions can get too big over time
 - Trim winners
 - Buy new things, or add to lagging positions that you still believe in
 - Cut your losses.
 - If the reasons you bought the stock are no longer valid, sell.
 - Not losing money is generally easier than making money.

Questions?