



INVESTOR SIGNALS
WEALTH GENERATION

CHARTING AND ALGO ENGINE

User Guide

JUNE 29, 2018



User Guide and navigation of features:







To access the member area visit www.investorsignals.com and select the “LOGIN” button at the top right corner.



Login will take you directly to the **CHARTS** function:



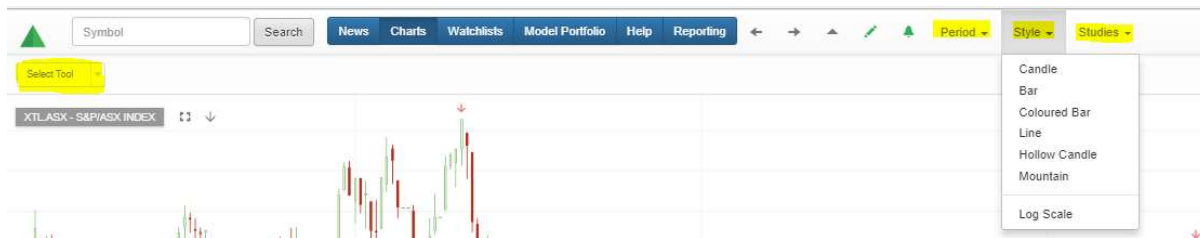
Various symbols and markers will be appear throughout the Chart screen:

-   Up / Down arrows are Pivot Points, these appear at price peaks and troughs.
-  symbols which appear along the X axis indicate a Blog post was made in relation to the stock. Clicking on the  will take you to the Daily Blog to read the commentary posted on the blog. To add/remove this symbol from view, click on the Pencil icon highlighted in the below screenshot.
-  symbol at top X axis of a chart indicates Lower Low / Lower High. This is a **Sell Signal** identified by the ALGO engine. Stock will be removed from the Model Portfolio. The ALGO engine will send an email as a Sell or Short recommendation.
-  symbol along bottom X axis of a chart indicates Higher Low / Higher High. This is a **Buy Signal** identified by the ALGO engine. Stock will be added to the Model Portfolio. ALGO engine will send an email as a Buy or Long recommendation. To add/remove these symbols from view, click the Bell icon highlighted in the below screenshot.



Charting features:

- Period, Style, Studies can be chosen from dropdown menus.
- Drawing tools are accessed via the dropdown menu at the top left corner of the chart.
- Charts are saved as changes are made.



- Scroll with your mouse wheel to zoom in/ out on any time periods.
- Use the crosshair to pinpoint a price, volume and date.



- Clicking on the $\leftarrow \rightarrow$ arrows (highlighted in below screenshot) will allow you to alphabetically toggle through stocks within the current Watchlist (ie, ASX20, ASX50, ASX100 etc)



Click on the Δ symbol to remove or 'Show Leon's Charts' (symbol highlighted in below screenshot).

- This displays content added to the charts by Investor Signals, which sometimes indicate support or weakness and often notes to substantiate signals identified by the ALGO engine.



WATCHLISTS:



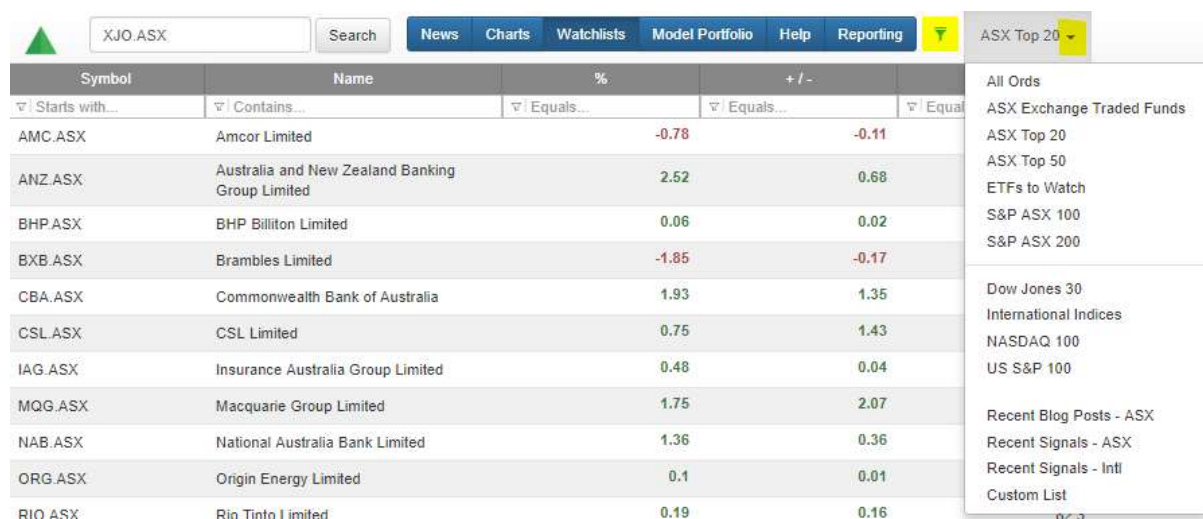
Choose from a range of watchlists from the dropdown menu shown in the screenshot below.

- Useful to see the constituents of a particular Index.

- Cell headers are interactive (eg, click cell heading to sort by % gain, Signal, or Symbol code alphabetically).

- Filters can be added by clicking on the filter symbol to the left of the watchlist dropdown (symbol highlighted below). One example is filtering stocks by the Buy or Sell Signal and then toggling through charts of Buy (or Sell) stocks to help understand how the ALGO engine is operating.

- Clicking on the Symbol code (eg AMC.ASX) will take you to the Chart of that stock.



Symbol	Name	%	+ / -
AMC.ASX	Amcor Limited	-0.78	-0.11
ANZ.ASX	Australia and New Zealand Banking Group Limited	2.52	0.68
BHP.ASX	BHP Billiton Limited	0.06	0.02
BXB.ASX	Brambles Limited	-1.85	-0.17
CBA.ASX	Commonwealth Bank of Australia	1.93	1.35
CSL.ASX	CSL Limited	0.75	1.43
IAG.ASX	Insurance Australia Group Limited	0.48	0.04
MQG.ASX	Macquarie Group Limited	1.75	2.07
NAB.ASX	National Australia Bank Limited	1.36	0.36
ORG.ASX	Origin Energy Limited	0.1	0.01
RIO.ASX	Rio Tinto Limited	0.19	0.16

Custom Watchlist:

A great feature of the Watchlist tool is the ability to create a Custom Watchlist. Users can enter their own share portfolio to track stocks the ALGO engine has applied a Buy or Sell condition upon. This is particularly useful for investors who often hold bad exposure for too long or take profits too early. The tool helps them with their decision making to manage their current share portfolio.

Create a Custom Watchlist:

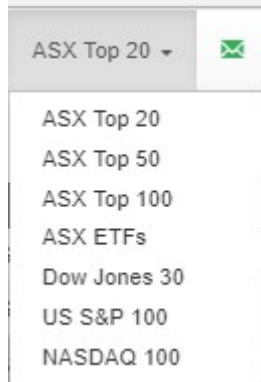
- Select Custom List from the dropdown menu.
- Enter stock code into the top left text box. Clicking on the stock name will add that stock to the Custom List
- To remove stocks, click the Trash Can symbol on the far right of the watchlist.
- Custom Watchlists are saved each time you make changes.
- The custom list allows you to track stocks within your own portfolio. Our ALGO engine will have already identified and applied a Buy or Sell condition to those stocks.

Symbol	Name	%	+ / -	Last	Ask	Bid	Volume	Open	High	Low	Signal	
ABC.ASX	Adelaide Brighton Limited	-0.14	-0.01	6.93	6.93	6.92	224,683	6.96	6.98	6.92	Sell	🗑
AGY.ASX	Argus Minerals Limited	-4	-0.01	0.24	0.25	0.24	1,853,289	0.25	0.25	0.24		🗑
AVZ.ASX	AVZ Minerals Limited	0	0	0.11	0.11	0.11	4,659,638	0.11	0.11	0.11	Buy	🗑
CQR.ASX	Charter Hall Retail REIT	0.47	0.02	4.24	4.24	4.23	195,932	4.24	4.25	4.2	Sell	🗑
DIV.AXW	UBS Iq Morningstar Australia Dividend Yield ETF	0	0	20.33	20.35	20.31	0	0	0	0	Sell	🗑
ETF.AXW	UBS Iq Morningstar Australia Quality ETF	0	0	21.07	20.45	20.43	0	0	0	0	Buy	🗑
FBR.ASX	Fastbrick Robotics Ltd	0	0	0.18	0.17	0.21	0	0	0	0	Buy	🗑
FDM.ASX	Freedom Oil and Gas Ltd	0	0	0.29	0.29	0.29	153,774	0.29	0.29	0.29	Sell	🗑
GNC.ASX	GrainCorp Limited	-1.78	-0.14	7.74	7.74	7.73	380,184	7.93	7.93	7.7	Sell	🗑
ILC.AXW	iShares S&PIASX 20 ETF	0.08	0.02	24.61	24.62	24.6	8,459	24.54	24.68	24.54	Buy	🗑
IOZ.AXW	iShares Core S&PIASX 200 ETF	0	0	25.81	25.81	25.79	147,131	25.85	25.89	25.75	Sell	🗑
IVV.AXW	iShares S&P 500 ETF	0.41	1.51	371.32	371.17	371	15,682	371.39	372.15	371.1	Buy	🗑
JHX.ASX	James Hardie Industries PLC	0.97	0.22	22.94	22.94	22.93	407,967	22.83	23.05	22.59	Buy	🗑
MOA.AXW	Vaneck Vectors Morningstar Wide Moat ETF	-0.52	-0.31	59.45	59.45	59.26	490	59.4	59.59	59.4	Buy	🗑
MVR.AXW	Vaneck Vectors Australian Resources ETF	0	0	26.85	26.94	26.89	0	0	0	0	Buy	🗑
PNR.ASX	Pantoro Limited	3.45	0.01	0.3	0.31	0.3	435,352	0.29	0.3	0.29	Buy	🗑
RTR.ASX	Rumble Resources Limited	0	0	0.06	0.06	0.06	387,999	0.06	0.06	0.06		🗑
SPY.AXW	SPDR S&PIASX 50 Fund	-0.07	-0.04	56.9	56.94	56.91	2,495	56.92	57.05	56.83	Buy	🗑
TSLA.NAS	Tesla Inc	1.58	5.43	349.93	350.2	350	6,587,529	348.66	357.02	346.11	Sell	🗑
TTT.ASX	Titonic Limited	0	0	2.68	2.68	2.67	261,178	2.76	2.8	2.66		🗑
TWE.ASX	Treasury Wine Estates Limited	0.17	0.03	17.52	17.53	17.52	556,169	17.55	17.64	17.46	Buy	🗑

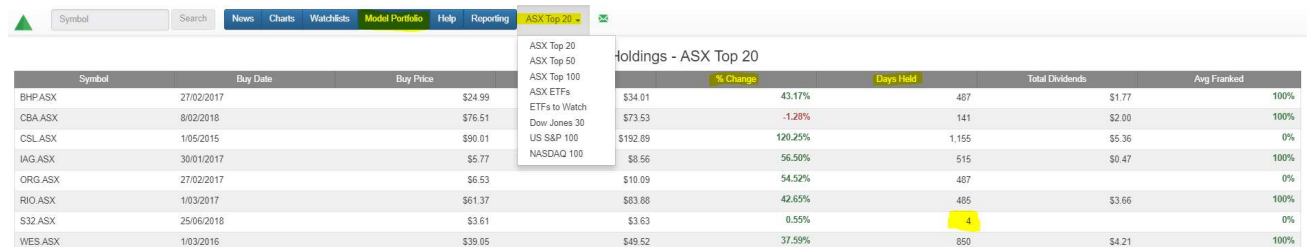
MODEL PORTFOLIO:



Each Model Portfolio is broken down into two sections, Current Holdings and Recently Closed Positions.



- Select a portfolio from the dropdown menu highlighted in the below screenshot.
- Choosing a model portfolio will not show each individual stock within that index. (Go to Watchlists to find Index compositions)
- The selected Model Portfolio will only contain the stocks that qualify to be in the model. (eg, the current ASX 20 model portfolio holds only 8 out of a potential 20 stocks).

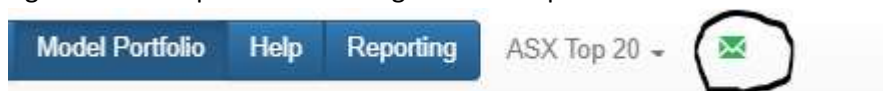


Symbol	Buy Date	Buy Price	% Change	Days Held	Total Dividends	Avg Franked
BHP ASX	27/02/2017	\$24.99	43.17%	487	\$1.77	100%
CBA ASX	8/02/2018	\$76.51	-1.28%	141	\$2.00	100%
CSL ASX	1/05/2015	\$90.01	120.25%	1,155	\$5.36	0%
IAG ASX	30/01/2017	\$5.77	56.50%	515	\$0.47	100%
ORG ASX	27/02/2017	\$6.53	54.52%	487		0%
RIO ASX	1/03/2017	\$61.37	42.65%	485	\$3.66	100%
S32 ASX	25/06/2018	\$3.61	0.55%	4		0%
WES ASX	1/03/2016	\$39.05	37.59%	850	\$4.21	100%

Useful ways to sort and utilize the Model Portfolio:

- Follow the model closely, aligning your own stocks with the portfolio.
- Sort columns by %Change to track the stock performance. %Change indicates the gains/ losses incurred whilst the stock has been held in the model.
- Sort columns by Days Held to identify new investment opportunities (if not mirroring your portfolio to the model portfolio). Some stocks have been held for several years and some for just days.

Each time a stock is added or removed in the Model Portfolio, an email will be sent by the ALGO engine. You can choose to receive alerts for any number of Model Portfolios by clicking on the envelope icon to the right on the dropdown menu. A green envelope indicates that alerts are ON.



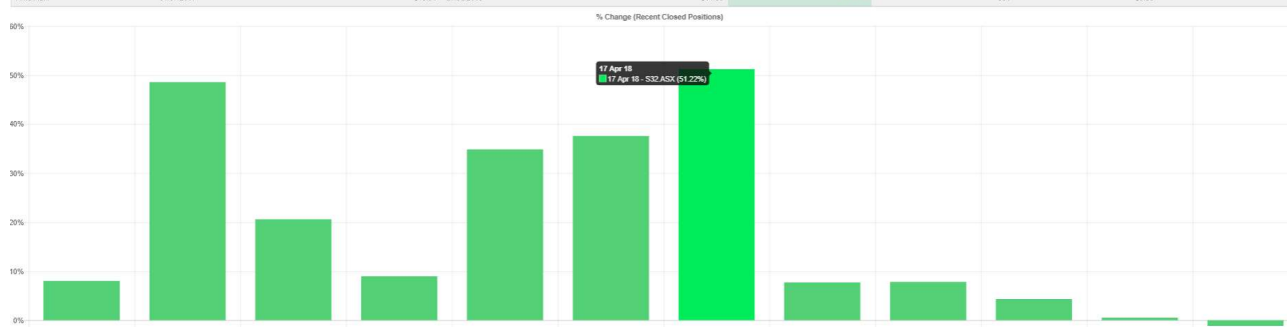
MODEL PORTFOLIO cont'd:

Recently Closed Positions

This section displays stocks the ALGO engine has identified as weak performers where momentum has begun to falter, having created lower lows and lower highs (Sell Signals).

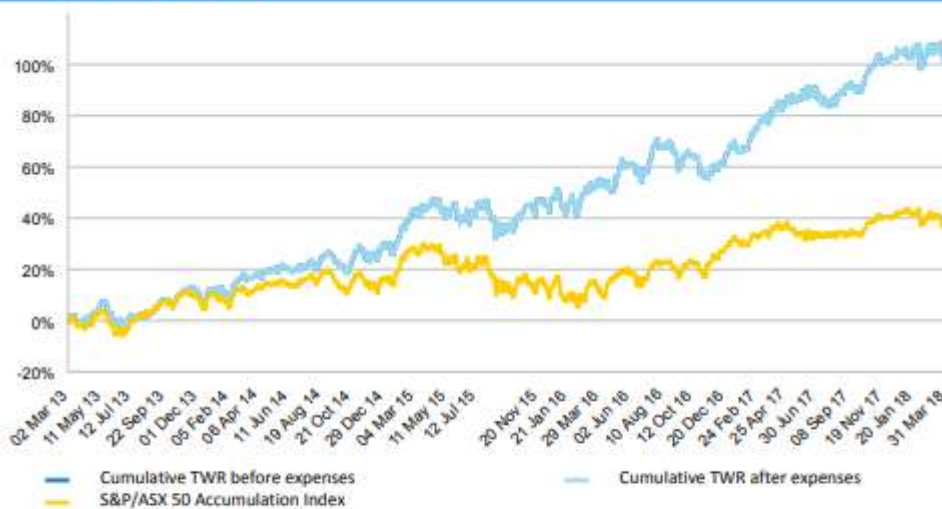
The %Change indicates the realised gains, plus dividends of the stock during the holding period within the portfolio.

Symbol	Buy Date	Buy Price	Sell Date	Sell Price	% Change	Days Held	Total Dividends	Avg Franked
S32 ASX	10/02/2017	\$2.54	17/04/2018	\$3.62	61.22%	431	\$0.22	71%
MOG ASX	25/06/2016	\$67.91	29/09/2017	\$90.92	48.53%	456	\$9.95	45%
NAB ASX	15/06/2016	\$24.98	27/02/2018	\$30.41	37.59%	622	\$3.96	100%
SCG ASX	30/06/2015	\$3.75	13/12/2017	\$4.42	34.91%	897	\$0.64	8%
WOW ASX	9/09/2016	\$22.85	1/11/2017	\$26.30	20.86%	418	\$1.27	100%
SUN ASX	4/08/2017	\$13.88	9/11/2017	\$14.18	8.99%	97	\$0.73	100%
CBA ASX	10/05/2017	\$81.73	29/06/2017	\$84.02	8.06%	50	\$4.30	100%
TCL ASX	3/07/2017	\$11.70	3/05/2018	\$12.68	7.86%	304	\$0.56	9%
WPL ASX	8/06/2017	\$31.02	26/04/2018	\$32.17	7.72%	322	\$1.25	100%
ANZ ASX	23/01/2017	\$29.27	11/05/2018	\$28.15	-4.37%	473	\$2.40	100%
WBC ASX	10/05/2017	\$32.65	15/05/2018	\$30.01	-8.56%	370	\$2.82	100%
AMC ASX	31/07/2017	\$15.34	27/06/2018	\$14.60	-4.17%	331	\$0.56	0%



Back-testing of the model portfolio has returns at ~15% (as at 31st March 2018) including dividends, which has outperformed ASX50.

Returns over time



Periods to 31 Mar 2018

Since
03/03/2013
p.a.

Portfolio return before expenses (TWR)

14.77%

S&P/ASX 50 Accumulation Index

6.28%