

INVESTORS HELP

SectorSurfer Users Group Meeting 20 May 2015

Sector Surfer



Joe Gruender Jr.

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SectorSurfer Meeting Agenda – 20 May 2015



- Greetings by SectorSurfer Joe,
- Special Presentation
By Peter James Lingane,
“The Challenges in Choosing a SectorSurfer
Composition. What Can an Investor Do?”
- SectorSurfer Questions and Answers.

Computerized Technical Analysis Group (CTAG)

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SectorSurfer Users Group Welcomes You!



- ▶ Our 16th SectorSurfer Meeting – Started in Nov. 2012,
- ▶ Meet ~ Every Two Months (No meeting in July 2015)
- ▶ Next Meeting – Tentative Mid-September 2015
- ▶ Number of Subscribers to SS Users Group – 270+
- ▶ Any “new” attendees here tonight – last 2 months?
- ▶ Info regarding this meeting will be available here:
<http://www.investorshelp.net/ss-meeting----may-2015.html>
- ▶ No videos from this meeting.

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Where To Find SectorSurfer Information



Use These Resources:

- ▶ www.SectorSurfer.com, (www.SumGrowth.com),
- ▶ SS Users Group on GoogleGroups.com,
- ▶ SS Pages at www.InvestorsHELP.net,
- ▶ SS Meeting Videos at www.vimeo.com.

"www.InvestorsHELP.net"

www.SectorSurfer.com
(www.SumGrowth.com)

SectorSurfer
Change the Game

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Home Example Strategies Using SectorSurfer Advanced Topics Theory Member Plans Referral Program F.A.Q.

SectorSurfer
Investment Strategies To Ride Sector Waves

SectorSurfer uses ...
True Sector Rotation Algorithms

- Know when trends start and end
- Own only the trend leader

Learn More ▶

1 Returns ▶ 2 Safety ▶ 3 Simplicity ▶ 4 Control ▶ 5 Examples ▶

Please click the graphic slides or the text just above for more on each topic.

Welcome!

SectorSurfer levels the playing fields by putting the power of high performance investment algorithms in your hands. SectorSurfer's trend-following **True Sector Rotation Strategies** hold only the momentum leader during bull markets, and its **StormGuard™** algorithm moves you to the safety of cash during bear markets. Only by owning the top trend leader and avoiding the trend laggards can you simultaneously improve returns and reduce the probability of loss. SectorSurfer helps you manage self-directed 401(k) investments and IRA investments without becoming a day-trader. Just a few trades per year. Email Trade Alerts are sent when trades are signaled.

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SectorSurfer Users Group at [https://groups.google.com/forum/#!forum/sectorsurfer,](https://groups.google.com/forum/#!forum/sectorsurfer)

SectorSurfer Users Group Shared publicly
★ 8+1

Welcome to the "Official SectorSurfer Users Group."

The investment concept "buy-and-hold" is a dinosaur from the past. In the 21st century we must shift our strategy. In the 21st century we must use strategies that enable us to pick winners, ride them, and then move to new winners as they are identified.

Scott Juds, President and CEO of SumGrowth Strategies LLC created a newly automated and highly effective strategy to use at "www.sumgrowth.com" and will help us find and hold the momentum leader during bull markets.

Hi, my name is Joe Gruender and I have selected "SectorSurfer" to guide me on my journey of selecting "Investment Opportunities" in 2012 to have an excellent platform for exchanging information, thoughts, strategies, and answer your questions.

SectorSurfer has a **Referral Program** where users can earn "credits" for additional services from SectorSurfer.

If you are new and have NOT yet signed up for a FREE or PAID subscription at SectorSurfer.com or SumGrowth.com, please sign up now.

If you hope you appreciate FREE access to this SectorSurfer Users Group. If so, on the SectorSurfer.com "sign-up" page, please indicate you are interested in this group.

Want help to get you started using SectorSurfer? If so, we have videos highlighting many of the features. See [July 2014 Meeting](#), [September 2014 Meeting](#), [November 2014 Meeting](#), [January 2015 Meeting](#) and [March 2015 Meeting](#).

Monthly Newsletters: Thanks to Scott Juds, Chief SectorSurfer, his newsletters, "Shoot The Curl -- Monthly Perspectives" and [SectorSurfer Monthly Perspectives](#).

NEW FOR 2015!

Our 2nd SectorSurfer Users Group Meeting in 2015 was held on Monday, March 23rd here in Silicon Valley. Scott Juds, Chief SectorSurfer, was the guest speaker. Check here for the details: [\[MARCH 2015 MEETING VIDEOS\]](#)

Our 3rd SectorSurfer Users Group Meeting in 2015 will be held on Wednesday, April 15th here in Silicon Valley. James Lingane, a very experienced SectorSurfer user, who will present: "Investor Do?" Get all of the details here: [\[TAKE ME TO THE DETAILS\]](#).

Do you want **FREE** videos, information, reports and analysis on SectorSurfer, market analysis, and video for investment?

Keep Surfing Safely and Profitably With SectorSurfer, SectorSurfer Joe

Thank you for joining the "Official SectorSurfer Users Group."
5.18.2015 JJG

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SectorSurfer Pages at www.InvestorsHELP.net



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WELCOME (JAN. 2015)

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AAII SumGrowth (LA)
Special Interest Group
AAII - LOS ANGELES CHAPTER
SumGrowth Special Interest Group
Reports & presentations from
SectorSurfer users in Los Angeles
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SectorSurfer -- Meetings >

Strategy of Strategies --
Scott Juds

Chief SectorSurfer -- Scott
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Joe Gruender Jr. In His Home Office



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New/Improved

SectorSurfer -- Meetings > SS Meeting -- Mar. 2015
Strategy of Strategies -- Scott Juds SS Meeting -- Jan. 2015
Chief SectorSurfer -- Scott Juds SS Meeting -- Nov. 2014
SS Meeting -- Sept. 2014
Best SectorSurfer Portfolios -- Dec. 2013 > SS Meeting [R] -- July 2014
SectorSurfer -- Monthly Perspective SS Meeting -- May 2014
SS Meeting -- Mar. 2014
SumGrowth -- Special Interest Group At AAIL (LA) SS Meeting -- Jan. 2014
SS Meeting -- Nov. 2013

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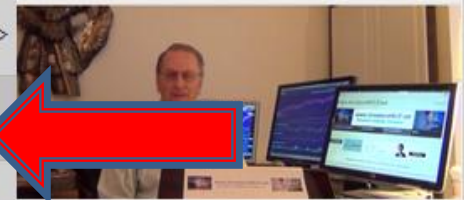
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- SectorSurfer -- Meetings >
- Strategy of Strategies -- Scott Judd
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SilverPepper
Commodity Strategies Global Macro Fund - Active Commodity Mutual Fund

Monthly "Perspective" From Chief SectorSurfer

Good News Fellow SectorSurfers! Scott Juds, Chief SectorSurfer, has given us permission to make available his Monthly Perspective that is issued to SectorSurfer subscribers. Each month Scott shares with us his perspectives on the markets, tips regarding tools found at the SectorSurfer website, and suggestions for improving your results when using the SectorSurfer software. We are sure that you will learn and enjoy reading these monthly newsletters. Thank you Scott from InvestorsHELP.net.

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SectorSurfer Perspectives For 2015

May 3, 2015	Perspective: Market Top? Hawaiian Shirts, New Stuff	 perspective-2 Download File
Apr. 4, 2015	Perspective: A Bit Choppy, Top 10 Portfolio, TipTop Portfolio	 perspective-2015-4.pdf Download File
Mar. 3, 2015	Beyond Record Highs, Healthcare Stocks Portfolio	 perspective-2015-3.pdf Download File
Feb. 3, 2015	Rough Start, Treasuries Rule, AlphaGen Introduction	 perspective-2015-2.pdf Download File
Jan. 4, 2015	The New Year, Yahoo Data, Don't Fight The Fed	 perspective-2015-1.pdf Download File

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SectorSurfer Perspective – May, 2015



Shoot The Curl
Monthly Perspective

Perspective: Market Top? Hawaiian Shirts, New Stuff

May 03, 2015

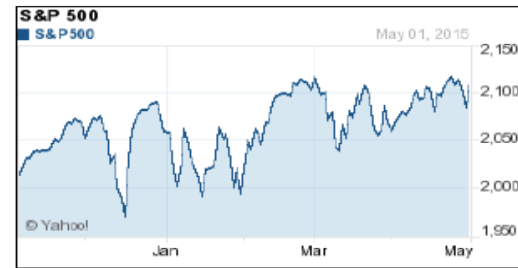
Dear Scott,

Is it a Market Top or Not?

The 6-Month chart of the S&P 500 (right) interestingly looks a lot like a triple top. While there is no shortage of Internet postings claiming "there is no such thing as a triple top," many others document the opposite. Although it may look like a triple top on this scale, it can't even be seen in the 9-Year chart below. Back in 2012 there was concern about the "dreaded triple top" some saw forming on a grand scale as the market climbed back to the prior peaks of 2000 and 2008. However, we powered through that barrier like nobody's business. Apparently fear of a triple top does not beget a triple top.

Instead, perhaps this is really an upward sloping pennant pattern that is about to break out to the upside at the pennant's tip. Take your choice: (1) a triple top about to break to the downside, or (2) an upward sloped pennant about to break to the upside. If chart patterns are in control of the future, we have an impasse. It appears the impasse will be resolved by real world events as demonstrated by the market rebound on Friday when calmness returned to Baltimore following a few days of rioting, looting, and burning.

The StormGuard Indicator continues to drift mildly lower, which is consistent with the observation that the market's rate of return as a whole is slowing — although still in a quite comfortable zone and still exhibiting admirable stability. One can do pretty well just riding the S&P 500 index higher when the market is recovering from a deep crash and almost everything is undervalued. However, once the recovery has pretty much run its course (and it has) it should be expected that the overall market returns will decline from those during the rebound period and that the importance of sector differentiation to identify trend leaders will become critically important.



6-Months



9-Years

SectorSurfer Perspective – May, 2015

What Sectors are on the Move?

Although healthcare related funds have been booming for quite some time, these have pulled back twice from a pair of new highs during the past two months. The reasons to expect their continued march higher into the future are many, but for the moment the market believes prices have gotten a bit ahead of themselves.

Meanwhile, two sectors seriously on the move include energy and emerging markets (see chart on right). Energy stocks suffered terribly in response to the significant drop in oil prices last fall caused by a slowing in economic activity (and energy consumption) just as new wells were coming online. While there may be an over-sold recovery play available for a while, one should be careful as the playing field in the energy space will be volatile for quite some time — companies with

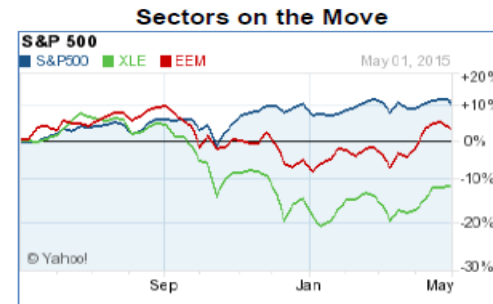


[Learn More About StormGuard](#)

higher production costs are likely to fail and have their assets absorbed at fire sale prices by larger established firms that can thrive in a \$50/barrel market. The apparent correlation between energy and emerging markets should not be a total surprise as energy production is a cornerstone of many emerging market countries.

The Hawaiian Shirt Society Investment Club is Launched

Pictured to the right are the members of the recently formed Hawaiian Shirt Society Investment Club independently formed by members of the L.A. AAI Chapter to exclusively use SectorSurfer Strategies and Portfolios to manage the club's assets. The photo was taken during a special seminar for the Hawaiian Shirt Society at the L.A. Skirball Cultural Center in March. I must say I was impressed by their cumulative investment experience, depth of understanding, and



SectorSurfer Perspective – May, 2015

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Note: Of course special attire was required for the Hawaiian Shirt Society meeting, and to comply Chief SectorSurfer wore his red "surfer dude" shirt adorned by the Hawaiian lei of beautiful flowers bestowed on him by the club. Hey, if you're going to have a nerd-fest with charts and numbers, you gotta be sure it's balanced with something a bit whack-a-doodle!



Hawaiian Shirt Society Invest. Club



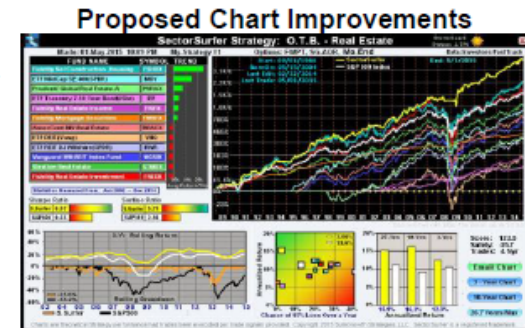
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SectorSurfer Perspective – May, 2015

New Stuff – Proposed Chart Improvements

We've long been contemplating a few chart improvements to better illustrate variability of return and severity of drawdown. Representing the variability of return by a single number, such as the Sharpe or Sortino Ratio, is like describing a 12 course dinner in degrees of yumminess. Similarly, describing the worst pain felt in childhood with a single number, such as Max Drawdown, neither considers how long the pain was felt nor how many times it was inflicted.

[Click to Enlarge](#)



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1. The 3-Year Rolling Return chart has been added to better understand variability of returns. The chart will be described in detail on the User Guide page.
2. The Max Drawdown bar chart will be replaced with the Rolling Drawdown chart. It is joined to the Rolling Return chart to make better use of available space. It will be described in detail on the User Guide page.
3. Many other things have been shifted to other locations to facilitate opening space for the new charts.
4. Some things have completely gone away including (a) the simple descriptions of the Sharpe Ratio and Sortino Ratio on the chart, (b) the measure of alpha and beta - nobody seems to really care much about them, and I would agree, (c) the Realized Max Drawdown value is not illustrated on the chart, but is in the spreadsheet download, (d) the orange button to close the chart in the lower right was redundant and is gone in favor of the standard red-X in the upper right.

If you feel strongly about any of these, please weigh in and make your case for how they should be done differently. Thanks!

SectorSurfer Perspective – May, 2015

Speaking Engagement Calendar

Please come and see one of these seminar presentations if you are in the neighborhood. Alternatively, ask your AAI Chapter or Investment Group leader to schedule a presentation. Webex presentations for smaller investment clubs and groups are also possible.

Seminar Title: **True Sector Rotation: Breaking Through the Efficient Frontier.**

This is a fast paced detailed seminar that will cover SectorSurfer basics, Forward Walk Progressive Tuning, Strategy-of-Strategies, and how to make Low Drawdown Portfolios.

- Baltimore, MD: AAI Chapter - Saturday, May 9, 10:00 AM
- Pittsburgh, PA: AAI Chapter - Tuesday, May 12, 7:00 PM
- Cleveland, OH: AAI Chapter - Wednesday, May 13, 7:00 PM
- Detroit, MI: AAI CI SIG - Saturday Sep 26, 10:30 AM
- Madison, WI: AAI Subgroup - Wenesday Oct 21, 6:00 PM
- Milwaukee, WI: AAI Chapter - Thursday Oct 22, 6:00 PM
- Twin Cities, MN: AAI Chapter - Friday, Oct 23, 7:00 PM (Intro)
- Twin Cities, MN: AAI Chapter - Sat, Oct 24, 9:00 AM (Advanced)
- Las Vegas, NV: AAI National Conference - Saturday Nov 7 - Nov 10
- Houston, TX: Houston Investors Association - Sat., Nov14, 9:00 AM
- Baton Rouge, LA: AAI Chapter - Thursday Nov 19, 6:00 PM
- Houston, TX: AAI Chapter - Saturday, Nov 21, 9:00 AM
- Phoenix, AZ: AAI Chapter - October 2016 - Stay tuned for details.

Surf Well and Prosper,



Scott Juds
President & Chief SectorSurfer
SumGrowth Strategies, LLC
www.SumGrowth.com



SS Users Meetings Videos

To Access Videos, Please Click on Title or Image

SectorSurfer Users Group Meeting
15 January 2015

SectorSurfer Users Group Meeting on Jan. 15, 2015

Your Topics, Your Requests, Your Comments, Your Suggestions, Equals = YOUR MEETING!

Chief SectorSurfer, Scott Juds, Provides The Answers.

Want Strategies and Portfolios? Don Kinell Provides Many For Your Consideration in His Now and Comprehensive Presentation.

Additional Comments By Chief Technical Officer, Jim Gamache.

Welcome and Introduction by SectorSurfer Joe Gruender.

SectorSurfer Users Group Meeting
23 March 2015



March 2015 SectorSurfer Users Group Meeting, Silicon Valley, California

10 Videos Now Available – Multiple Topics From Chief SectorSurfer – Scott Juds And SectorSurfer Joe – Joe Gruender Jr.

- ◆ True Sector Rotation
- ◆ Server Process Monitor
- ◆ Reliable FastTrack Data Update
- ◆ Why Stock Strategy Died in 2014
- ◆ Better Ways to Select Stocks
- ◆ Select Stocks by Sector?
- ◆ Healthcare Sectors Portfolio (No Flat Tire!)
- ◆ Most Portfolios vs. SectorSurfer Strategies
- ◆ The Tale of Two Trends
- ◆ Extended ETF Versions
- ◆ Quarterly Return Probability Distribution
- ◆ SCS – Why StormGuard OHT?
- ◆ What is most effective entry time?
- ◆ Which StormGuard is better – SG-AQR or SG-STD?
- ◆ FLBAK in Fidelity Super Safe?
- ◆ Smart Trailing Stop Loss?



SectorSurfer Users Group Meeting
16 July 2014

My SectorSurf Journey

By:
Gary Noreen



See How I Profit Using SectorSurfer!

SectorSurfer Users Group Meeting
17 September 2014

SectorSurfer Users Group Meeting – Sept. 17, 2014

Very Special Guest Speakers:

Scott Juds
Chief SectorSurfer
SumGrowth.com



Jim Gamache
Chief Technical Officer
SumGrowth.com



Introductions By:
Joe Gruender Jr.
SectorSurfer Joe
Owner: InvestorsHELP.net



Sector Surfer

SectorSurfer Users Group Meeting
19 November 2014



SECTORSURFER USERS GROUP MEETING NOVEMBER, 2014

HERE'S WHAT'S AVAILABLE FOR YOU:

1. SectorSurfer meeting with SectorSurfer Joe.
2. A Robust Video Series: Want To Reap The Benefits When Using 9 New Master Strategy-of-Strategies (MSOS)?
3. A Robust Video Series: Do You Want Decent Returns With New Low Drawdown Strategies From SectorSurfer?
4. Spotting Market Tops & Bottoms (More Frequent Alerts Than StormGuard!) Is this indicator right for you?
5. Presentation Slides For All Of The Above.

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James Peter Lingane



- ❖ Peter is a recovering buy and hold investor who applies his analytical skills to tax and investment issues.
- ❖ He is licensed as a tax professional by the US Department of the Treasury and as a planning professional by the Certified Financial Planning Board of Standards.
- ❖ Peter's seminars are always well received.

Tonight's Presentation

SPECIAL TOPIC: "The Challenges in Choosing a SectorSurfer Composition. What Can an Investor Do?"

By: Peter James Lingane

It is usually possible to find a portfolio of twelve funds which performs well with a specific momentum algorithm. This approach is tedious since we do not yet know the relationship between composition and algorithm. More importantly, the evidence from tens of thousands of simulations is that an optimized 12-fund portfolio is likely to under perform in the out of sample period.

The alternative approach is to allow the simulator to choose from a larger suite of funds. Attractive results over the 24-year out of sample period were obtained when a double exponential moving average trend measuring algorithm was applied to a suite of thirty-two focused US equity funds.

NOTICE: PETER HAS REQUESTED THAT THIS PRESENTATION NOT BE RECORDED.

Presentation By
James Peter Lingane

Load Separate Presentation

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