

**INVESTORS Help**

# SectorSurfer Users Group Meeting 19 Mar 2014

**Sector Surfer**



Joe Gruender Jr.

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# SectorSurfer Meeting Agenda – 19 Mar 2014

- Introduction by SectorSurfer Joe
- What's Surfing With SectorSurfer?
- Presentation by Glenn Patterson
- AAll Special Interest Group by SectorSurfer Joe
- Next Meeting -- Scott Juds in Silicon Valley
- Questions and Answers on SectorSurfer

# SectorSurfer Users Group Welcomes You!



- ▶ Our 8<sup>th</sup> SectorSurfer Meeting – Started in Nov. 2012,
- ▶ Meet ~ Every Two Months (Next Meeting – 19 May),
- ▶ “SectorSurfer Users Group” on GoogleGroups.com,
- ▶ Check “Welcome Letter” for latest announcements,
- ▶ Number of Subscribers to SS Users Group – 224
- ▶ Any “new” members here tonight – last 2 months?
- ▶ SS Videos available at “InvestorsHelp.net”
- ▶ Info regarding this meeting will be available here:  
“<http://investorshelp.net/sectorsurfer-meetings.html>”

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# What's Surfing With SectorSurfer? Current & Coming Events

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# Current Events—Users Group Welcome Letter @ Google Groups

SectorSurfer Users Group Shared publicly



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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 strategies and focus on the best investments meeting our financial goals. As financial markets become more volatile, we must use strategies that enable us to pick winners, ride them, and then move to new winners as they are identified. We can use mutual funds, exchange traded funds, individual equities, or all.

Scott Juds, President and CEO of SumGrowth Strategies LLC created a newly automated and highly effective stock, ETF, and fund picker called "SectorSurfer." His high performance investment algorithms are available for our 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 Strategies To Ride Sector Waves" in the 21st century. I created this SectorSurfer Users Group in November 2012 to have an excellent platform for exchanging information, thoughts, strategies, and answer your questions.

SectorSurfer has an excellent Referral Program. If you like this FREE Users Group, please click "FREE PLAN" or "SECTORSURFER" buttons on the referenced page so I receive a few credits: <http://investorshelp.net/chief-sectrorsurfer---scott-juds.html>

Thanks to Scott Juds, Chief SectorSurfer, his newsletters, "Shoot The Curl -- Monthly Perspective" including the March 2014 edition, are now available for your viewing at: <http://investorshelp.net/sectrorsurfer---monthly-perspective.html>.

Congrats to Les, Glenn and Shaun for winning the SectorSurfer Portfolio Design Contest for 2013 and to those who received "Portfolio Honorable Mention Awards." If you want to review the details, they can be found here:

<http://investorshelp.net/sectrorsurfer-portfolio---lowest-drawdown.html>  
<http://investorshelp.net/sectrorsurfer-portfolio---most-impressive-ride.html>  
<http://investorshelp.net/sectrorsurfer-portfolio---highest-scorexsafety.html>  
<http://investorshelp.net/sectrorsurfer-portfolio---honorable-mention-awards.html>

**Access to portfolio design winners.**

Details and videos for previous meetings are available here: <http://investorshelp.net/sectrorsurfer---meetings.html>

**More Good News!** Although FREE access is no longer available to Scott's Strategy-Of-Strategies portfolio, details are now available for our analysis. See how a combination of Fidelity funds and sector, ultra and other ETFs generated annualized returns greater than 40+% over 3, 10 and 25 years. Want to create this strategy-of-strategies yourself? You can now have immediate access to the details regarding this powerful portfolio by clicking on this link and signing up for FREE access: <http://investorshelp.net/strategy-of-strategies---scott-juds.html>

**Special Meeting Notice!** Glenn Patterson, Winner of "The Most Impressive Ride" category in SectorSurfer's 2013 Portfolio Design Competition, has agreed to give his presentation entitled: "Constructing A Prize Winning Portfolio" at our March Users Group Meeting. You don't want to miss this one! This, our second meeting in 2014 for the SectorSurfers Users Group, is now scheduled for Wednesday, March 19th. We will begin earlier at 6:00 PM so that we have more time to learn about SectorSurfer. Be sure to mark your calendars. See you on March 19th.

Let us learn, enjoy and profit using the powerful capabilities offered by SectorSurfer:-)

**Latest information regarding meetings.**

Best,  
SectorSurfer Joe



Joe Gruender  
Users Group Owner



Scott Juds  
Chief SectorSurfer

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# SectorSurfer Info. At InvestorsHELP.net

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Notice: **FREE** Details Are Now Available For  
The New "Strategy-Of-Strategies" Portfolio!

[S-OF-S DETAILS](#)

## Welcome

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### New Videos:

[Videos -- Mar. 2014](#)  
[Videos -- Jan. 2014](#)  
[Videos -- Nov. 2013](#)  
[Videos -- Oct. 2013](#)  
[Videos -- Sep. 2013](#)

## Two Important Questions:

These two questions I've been asked hundreds of times during my 30 years as an investor and trader:

1. I am new to investing and there's so much information on this subject; where do I start and now do I begin as a trader or investor?
2. Now that I am nearing retirement or in retirement, what can I do to protect, yet grow, my accumulated retirement funds?

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- Strategy of Strategies -- Scott Juds >
- Chief SectorSurfer -- Scott Juds
- SumGrowth -- Special Interest Group At AAll (LA)
- Best SectorSurfer Portfolios -- Dec. 2013 >
- SectorSurfer -- Monthly Perspective
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these two questions I've been asked hundreds of times during my 30 years as an investor and trader:

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# Info. For Past & Future Meetings



Joe Gruender  
Users Group Owner



Scott Juds  
Chief SectorSurfer

## SectorSurfer Users Group

Please join our free SectorSurfer Users Group where you can learn, share, watch videos and see schedule for meetings in Northern CA. Click button, then insert "SectorSurfer" and click "Join" for our users group.

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WHY ADS?

ETF Income Engine Closing

profitsrun.com

The ETF Income Engine closes on Thursday night. Enroll here.



## SectorSurfer Users Group Meeting (19 Mar 2014)

Merrill Edge® Investing

merrilledge.com

Simplify. View Your Merrill Edge® & Bank Of America Accounts Together.



## SectorSurfer Users Group Meeting -- Mar. 19, 2014



SectorSurfer Joe

Our 8th SectorSurfer Users Group meeting will be held on Wednesday, March 19th, 2014 at 6:00 PM at Holder's Country Inn, 998 S. De Anza Blvd, San Jose, CA (Across from Home Depot). Restaurant Tel: (408) 244 - 2798. Videos from this meeting will be available after this meeting.

**NOTICE: We will start at 6:00 PM.**

This will give us more time for SectorSurfer discussions.

**SectorSurfer Users Group Meeting Videos  
(Will be available here after the meeting.)**

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# What's Available At InvestorsHELP.net?

The screenshot displays the website header with the URL **www.InvestorsHELP.net** and the name **Joe Gruender Jr.** Below the header is a banner with a handshake icon, the website URL, and the slogan *"Investors Helping Investors"*, alongside a photo of a Wall Street sign. A navigation bar contains three buttons: **NEW VIDEOS – CLICK HERE**, **SECTORSURFER**, and **MORE...**. A dropdown menu is open under **SECTORSURFER**, listing: **Chief SectorSurfer – Scott Juds**, **Best SectorSurfer Portfolios – Dec. > 2013**, **SectorSurfer – Monthly Perspective** (with a mouse cursor), and **SectorSurfer Meetings**. On the left, a sidebar lists: **Silicon Valley Options Group (Coming Soon)**, **SectorSurfer Users Group (Coming Soon)**, and **AAll Silicon Valley CI-MI Group Coming Soon**. The main content area features a red headline **Looking for Profitable 2014!** and a red call-to-action box with a white arrow pointing left that says **Want Newsletter?**. A legal disclaimer is partially visible, mentioning a trademark infringement claim and a resolution.

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## Want To Save Time? “Perspective” Newsletters On InvestorsHELP.net

- Eliminates need to sort through many emails,
- Consolidates newsletters into one location/page,
- Provides easy access to each Perspective,
- Can be downloaded for your own use  
or for making your own copy,
- Active links are provided for easy access to  
information of interest to you.

<http://investorshelp.net/sectorsurfer----monthly-perspective.html>




# Monthly "Perspective" Newsletters

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Choose the "Perspective" that you want to review.

## 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!

Mar. 04, 2014   February Rebound, AAll Wizards, Something New

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Feb. 04, 2014   January Jitters, New TSP, Strategy-of-Strategies

[perspective-2014-2\\_3.pdf](#)   
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# Contest Winners Announced In Dec. 2013



Shoot The Curl  
Monthly Perspective

## Announcing the Portfolio Design Contest Results

Dec 23, 2013

### Superb Portfolio Designs Were Submitted

We have selected three spectacular Portfolios, from among many, as champions in these categories:

- 1) Lowest Drawdown
- 2) Most Impressive Ride
- 3) Highest [Score]x[Safety]

Congrats to Contest Winners!

Please join me in congratulating their creators for their spectacular achievements, and thanking them for generously sharing their high performance Portfolio design skills with others. As with the Strategy Hall of Fame page, I expect the [Model Portfolios page](#) will not only be of tremendous help to others just getting started, but will also act as a knowledge base for extending the portfolio design skills of anyone willing to learn from and build on the shoulders of champions who have stood tall.

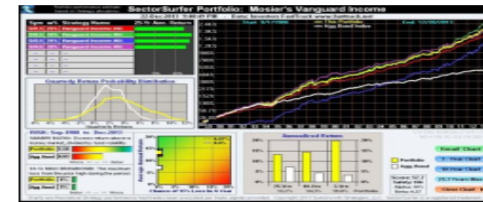
I present to you the amazing Portfolio Design Champions!

### ★ Mosier's Vanguard Income Portfolio — Lowest Drawdown ★

This risk-averse, conservative portfolio is comprised of Vanguard mutual funds with emphasis on preservation of capital and steady income. The portfolio had' one losing year in 2000 (-.23%) and just five fractional or single-digit trading losses since 1988. For those who recall the chilling reality of losing a large portion of "diversified" retirement funds during the market meltdowns, this portfolio is designed to provide the ultimate in safety as a safe harbor during inevitable market storms.



Master of  
Safe Surfing  
Les Mosier



Click Chart to See Portfolio Details

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Today

# Best SectorSurfer Portfolio Results

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NEW VIDEOS -- CLICK HERE	SECTORSURFER	MORE...
	Chief SectorSurfer -- Scott Juds	
	Best SectorSurfer Portfolios -- Dec. 2013	SectorSurfer Portfolio -- Lowest Drawdown
	SectorSurfer -- Monthly Perspective	SectorSurfer Portfolio -- Most Impressive Ride
	SectorSurfer Meetings	SectorSurfer Portfolio -- Highest [Score]x[Safety]
	will soon resolve this until the IBD CANSLIM method using this system; that's once again with full agree	SectorSurfer Portfolio -- Honorable Mention Awards



Details, Links, Downloads!


All Contest Winners!

New Videos Coming in January 2014


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# Best SectorSurfer Portfolio Results

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(Coming Soon)

SectorSurfer Users Group  
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All Silicon Valley CI-MI Group  
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will soon resolve this un  
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SectorSurfer  
Portfolio -- Lowest  
Drawdown

SectorSurfer  
Portfolio -- Most  
Impressive Ride

SectorSurfer  
Portfolio --  
Highest  
[Score]x[Safety]

SectorSurfer  
Portfolio --  
Honorable  
Mention Awards

4! **Today!**

**Most  
Impressive  
Ride!**

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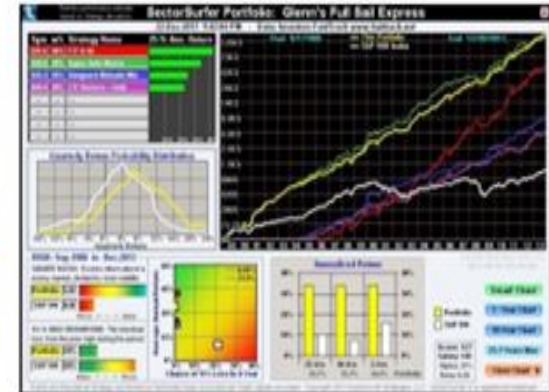
# Today's Special Speaker & User

## ★ Glenn's Full Sail Express Portfolio — Most Impressive Ride ★

My portfolio design goals were to maximize Sharpe ratio, keep drawdown under 20%, and maintain annual returns over 30%. The results are: a Sharpe ratio of 1.82, max drawdown of 19%, annual returns over 30%, and no losing years. H.O.F. data was downloaded and sorted by Sharpe ratio, Safety Score, and Max Drawdown to establish candidate strategies, which were then all run through FWPT and optimized using Advanced Options features. I'm sure there's room for further improvement.



*SurfMaster and Commander*  
**Glenn Patterson**



Click Chart to See Portfolio Details

## Glenn Patterson – Our Winning Speaker



# Presentation By Glenn Patterson



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*Investment Strategies To Ride Sector Waves*

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Thank You!

**SectorSurfer**<sup>®</sup>  
*Investment Strategies To Ride Sector Waves*

Glenn Patterson

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# Glenn's Work Is Available At InvestorsHELP.net

## Portfolio Construction

My portfolio design goals were to maximize **Sharpe ratio**, keep drawdown under 20%, and maintain annual returns over 30%. The results are: a Sharpe ratio of 1.82, max drawdown of 19%, annual returns over 30%, and no losing years. Hall of Fame (**H.O.F.**) data was downloaded and sorted by Sharpe ratio, Safety Score, and Max Drawdown to establish candidate strategies, which were then all run through **FWPT** and optimized using Advanced Options features. Glenn thinks that there's room for further improvement.

The Portfolio (Chart #1) holds four diversified sector and asset class rotation Strategies (Charts #2, #3, #4, and #5), rebalanced quarterly to their assigned allocation weights. Each Strategy selects the one, and only one, best-of-breed fund in its class to represent the Strategy in the overall Portfolio. The Portfolio holds only those four funds. The below allocation is used for each strategy:

- Chart 2, Strategy #1 — ETF X.4e — 30%
- Chart 3, Strategy #2 — Super Safe Moms — 20%
- Chart 4, Strategy #3 — Vanguard Mutuals Mix — 20%
- Chart 5, Strategy #4 — ETF Sectors + Gold — 20%



[champion\\_2\\_chart\\_1.png](#)  
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<http://investorshelp.net/sectorsurfer-portfolio----most-impressive-ride.html>

# New Perspective Newsletter -- March

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WHY ADS?

5.75% High Yield CD

New information in the March 2014 "Perspective"

## 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!

Mar. 04, 2014

February Rebound, AAll Wizards, Something New

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# Perspective – March 2014 – View 1



Have you read?

Shoot The Curl  
Monthly Perspective

## Perspective: February Rebound, AAII Wizards, Something New

Dear Scott,

### Virus Smashed!

Mar 04, 2014

#### The Digital Dragon - He Be Slayed:

An evil digital dragon attacked our server yesterday morning following a system update and smote all SectorSurfer login attempts, returning only a cryptic error screen betraying the dragon's presence. My numerous personal attempts to restore peace and tranquility grew seemingly ever more futile. Fortunately, my accomplished partner Jim Gamache soon arrived at his snowy travel destination, quickly assessed the root cause, reached through the ether and remotely terminated the dragon's death grip after striking just a single blow. And that, my fellow Surfers, both explains yesterday's rift in the surf, and provides a glimpse into the exciting lives we lead. We did appreciate your patience - thanks.

#### The February Rebound - What the Charts Say Now:

Although we all felt pretty glum at the end of January as the market plunged, it has since bounced back with vengeance. Although there are weakening signs in the recently reported unemployment and housing statistics, the markets remain bullish. Most analysts believe it relates to expectations that the Federal Reserve will "taper the taper" and continue pumping billions of dollars of liquidity into the economy. In any case, the 5.5% dip in January is really only a small blip in the big picture, and as SectorSurfers, we know it's better to ride through these small dips than to experience whipsaw losses trying to play them. See: [The Faster Response False Dilemma](#).

Of course, 16,000 Russian troops deployed to Ukraine, new energy taxes, and the California/Texas droughts are worrisome. However,



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# Perspective – March 2014 – View 2

taxes, and the California/Texas droughts are worrisome. However, these problems are not of the magnitude that can threaten a market crash. So, we'll likely continue the bumpy road higher, not stopping at fair market value, but pushing higher into the excesses of an overbought bubble for a few years. Bubbles do eventually pop, but SectorSurfer will help you stay ["On the Bubble!"](#)

**WOW – Nice!**

**AAII Wizards Speak to Standing Room Only Crowd:** The first meeting of the AAII SumGrowth Special Interest Group (SIG) was held February 22nd at the Culver City's Veteran's Memorial Complex with roughly 200 in attendance, and it was "standing room only," according to Don Gimpel the President of the [6,000 member AAII LA Chapter](#). Gary Noreen, the SumGrowth SIG Leader, and Don Gimpel (Don's son) were both speakers at Saturday's meeting.



SectorSurfer Special Interest Group  
AAII Los Angeles Chapter

Two new presentations from SumGrowth's Special Interest Group

<http://investorshelp.net/aaii----sumgrowth-special-interest-group.html>

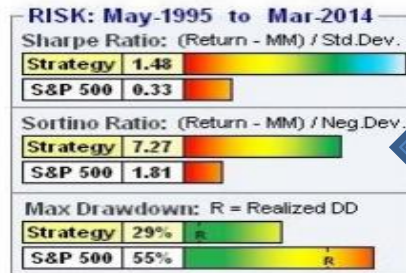
Gary

Dan

**Gary Noreen** (a.k.a. Yoda) recently retired from NASA's Jet Propulsion Lab at the California Institute of Technology as a Systems Architect and Telecommunications Engineer for the Mars Exploration Rover Missions. He is a "true rocket scientist" who understands the value of our signal processing and matched filter theory methods. His presentation focuses on high performance Strategies and Portfolios. See: [AAII-SectorSurfer-Portfolios-GNoreen-2014.pdf](#).

**Dan Gimpel** is the President of Advanced Analytical, Inc, the owner of FoodSoftware.com. Dan's penchant for creative design combined with his seasoned investment tool experience lead to a brainstorming set of emails to me last year that resulted in the development of SectorSurfer's quite popular Painted Path feature. Dan's AAII presentation is hands down the best introduction to SectorSurfer I've ever seen, particularly for beginning and average investors. See his presentation here: [AAII-SectorSurfer-Pointers-DGimpel-2014.ppsx](#).

LA Chapter President: Don Gimpel - [DGimpel@Roadrunner.com](mailto:DGimpel@Roadrunner.com)  
SumGrowth SIG Leader: Gary Noreen - [YODA@ardio.com](mailto:YODA@ardio.com)



[Click to See Description](#)

New

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# AAll SumGrowth Special Interest Group

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**AAll – LOS ANGELES CHAPTER  
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**Two New Presentations Now Available!**

**AAll Wizards Speak To Standing Room Only Crowd!**



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# SIG Presentations Available At InvestorsHELP.net

**AAll LA Chapter President: Don Gimpel - DGimpel@Roadrunner.com**  
**SumGrowth SIG Leader: Gary Noreen - YODA@ardio.com**

**Want a FREE membership to SectorSurfer?**

**FREE MEMBERSHIP TO SECTORSURFER**




**Gary Noreen (a.k.a.Yoda)** recently retired from NASA's Jet Propulsion Lab at the California Institute of Technology as a Systems Architect and Telecommunications Engineer for the Mars Exploration Rover Missions. He is a "true rocket scientist" who understands the value of our signal processing and matched filter theory methods. His presentation focuses on high performance Strategies and Portfolios.

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Gary (Yoda) Noreen's Presentation

# SECTORSURFER PORTFOLIOS

Los Angeles AAI Strategic Investing SIG

Gary ("YODA") Noreen

*Aerial Videographer*

February 22, 2014

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# Gary (Yoda) Noreen's Presentation

## AGENDA

- Brief Review
- Genesis of a Top Dog Strategy
- Strategy Metrics
- Portfolio of Strategies
  - Model Portfolios
  - "Own the Bubble"
  - Portfolio of Strategies of Strategies
  - My Portfolio



# Gary (Yoda) Noreen's Presentation

## SECTORSURFER CHANGED MY LIFE

- Assumed 5% return when calculating retirement income. Now expect at least twice that, possibly several times.
- Increased investing confidence
- Consciously spending much more
- My relatives are hitting me up for money

# Gary (Yoda) Noreen's Presentation

## LESSONS

- 
- If there is a change signal, don't wait a few months to see if there's really something to it. Go ahead and make the change.
    - If you are uncomfortable with a new equity signaled in a strategy you are following, remove the equity from the strategy and see how the revised strategy performs without it.
  - Tweak strategies created by others – you just may find something better, or at least more in tune with your comfort zone.
- 



# Dan Gimbel's Presentation

***SectorSurfer***®  
*Investment Strategies To Ride Sector Waves*

## SectorSurfer STRATEGY POINTERS

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A Beginner's Guide to Selecting and Creating Strategies

*As presented by Dan Gimpel on Feb. 22, 2014*

**Contact:** SectorSurferDan@gmail.com

"www.InvestorsHELP.net"

# Dan Gimbel's Presentation

## What SectorSurfer and Sumgrowth Are



- “SectorSurfer” is the online trading tool web site.
- “SumGrowth” is the name of the company that runs the site.
- **We’ll call the web site “Surfer” for short.**
- Access Surfer at either [www.SectorSurfer.com](http://www.SectorSurfer.com) or [www.SumGrowth.com](http://www.SumGrowth.com) . Same thing.
- Surfer is a subscription “web-based software service”, meaning, it runs in your browser only, it needs the internet to work, and you pay a monthly or yearly fee to use it.
- There’s nothing to install on your PC to make it work.

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# Dan Gimbel's Presentation

## Takeaways (Key Points)

- Surfer is plug-n-play easy and can give you great results fast.
- Though it's easy to use, it's also easy to use **wrong**.
- Surfer makes strategies from any funds you choose but it's still **Garbage In, Garbage Out**.
- In many *Strategy Charts*, there is a **data age warning flag** that's easy to ignore, so watch out for it! Surfer often presents old instead of current data, and this makes a big difference.
- Surfer has a wonderful **Hall of Fame** feature where other users' best strategies are made available for you to use. This feature is a great and easy way to start with Surfer.
- Don't let Surfer strategies convince you to buy funds you would otherwise never want to own.
- Use **trial and error** to find what makes strategies work best.



# Dan Gimbel's Presentation

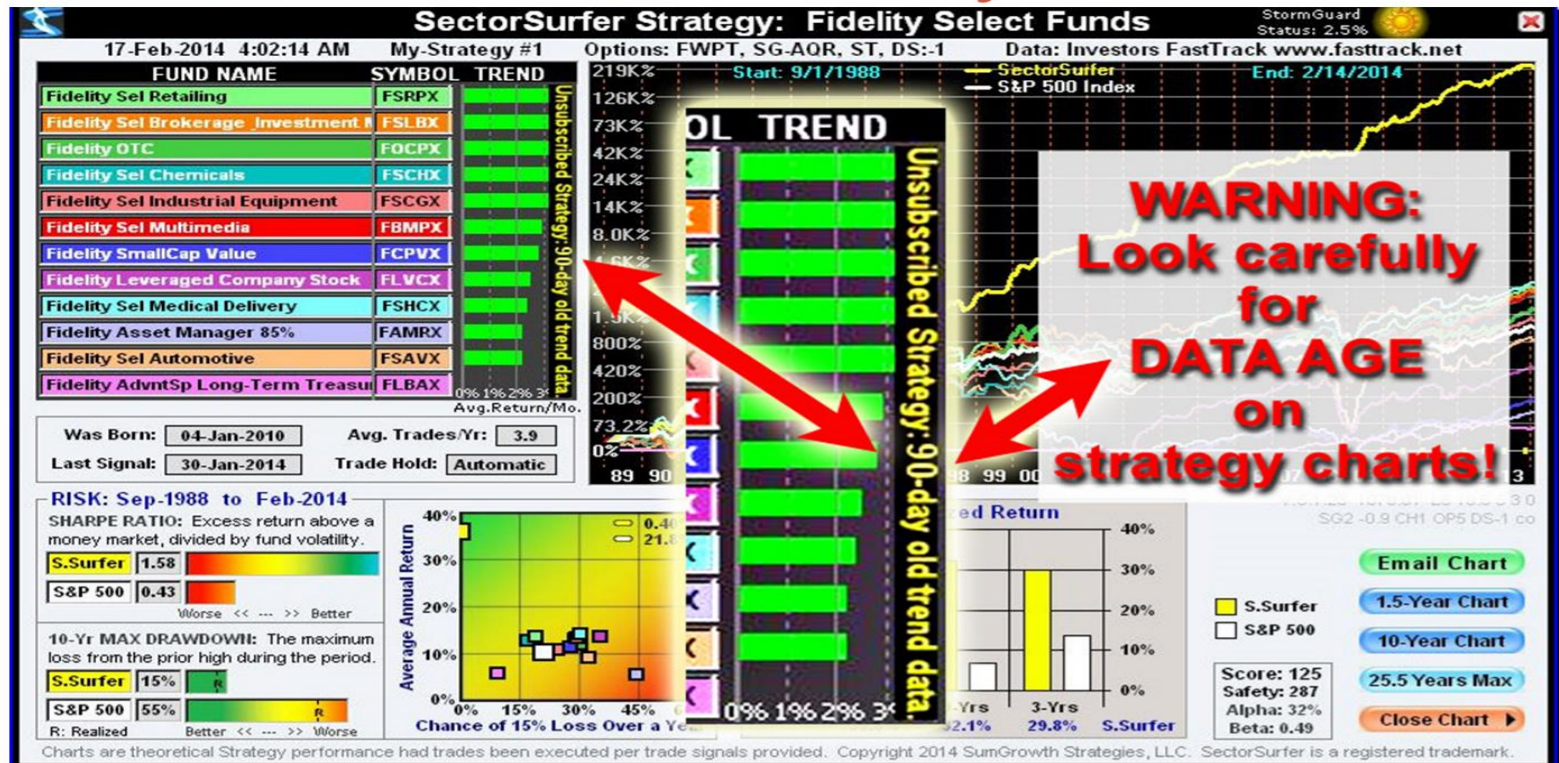
## Cautions (iii):

### Technical Trading Only

- Surfer is a pure “technical” trading tool that only pays attention to price trends.
- Surfer does not consider fundamentals at all. (That's *your* job!)
- Fundamentals should still be a major consideration of yours when selecting funds for strategies.
- Don't choose funds for strategies that you would never otherwise own on their fundamentals.
- Choose the funds you would own prudently.

# Dan Gimbel's Presentation

## Warnings & Pointers (ii): Non-Current Charts Widely Used



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# Dan Gimbel's Presentation

## Takeaways

- Surfer is plug-n-play easy and can give you great results fast.
- Though it's easy to use, it's also easy to use **wrong**.
- Surfer makes strategies from any funds you choose but it's still Garbage In, Garbage Out.
- Only charts in Active Strategies use current data; all others use old data. So watch out- it's easy to miss, and it makes a big difference.
- Don't let Surfer strategies convince you to buy funds you would otherwise never want to own.
- Do shop for strategies in the Hall of Fame, and:
  - Study them carefully and look for ideas
  - Make sure you can use them – that all their funds are available to buy.
  - Be skeptical and careful, and invest prudently.
- Use trial and error to find what makes strategies work best.



# Perspective – March 2014 – View 3

## March Perspective continued.

### Something New – The Sortino Ratio:

Some subscribers have asked for the Sortino Ratio because it is generally viewed as an important improvement over the Sharpe Ratio. A few days ago, the Sortino Ratio became a standard part of every chart, residing just under the Sharpe Ratio. The reason it is considered an improvement is that the Sharpe Ratio lumps both up-side and down-side return variation together in its measure of risk. Most people think of up-side variation as an experience of WooHoo, not BooHoo. However, the Sortino Ratio only includes negative monthly returns (those that are less than a money market fund would return) when calculating risk. It is therefore very similar to the idea of our square chart for the "Probability of Loss of 15% in a Year." Click the bar chart above to learn more.

Surf Well and Prosper,

## Do you use the Sortino Ratio?



Scott Juds  
President & Chief SectorSurfer  
SumGrowth Strategies, LLC  
[www.SumGrowth.com](http://www.SumGrowth.com)





# The Sortino Ratio

“to measure an investment’s added return over very safe money market”

## • Sortino Ratio Risk Measure

The Sortino Ratio is commonly used in the financial industry to measure an investment's added return over that of a very safe money market fund relative to the higher investment risk taken. The ratio is named for Dr. Frank A. Sortino, an early popularizer of downside risk optimization. The mathematical expression for the Sortino Ratio is:

Sortino Ratio: (Return - MM) / Neg.Dev.		
Strategy	6.52	
S&P 500	0.58	

$$\text{Sortino Ratio} = (\text{Fund Average Return} - \text{Money Market Return}) / (\text{Downside Deviation}) \quad \text{Added?}''$$

The Fund Average Return is calculated by first finding the ratio of the ending value to the starting value of the fund, finding its Nth root, and subtracting one — where N is the number of years between the starting value and the ending value. The Fidelity SPRXX money market fund is used as the riskless reference return to beat.

$$\text{Fund Average Return} = (\text{EndValue}/\text{StartValue})^{(1/N)} - 1 \quad \text{To calculate Downside Deviation.}$$

The Downside Deviation is calculated by stepping through the database day-by-day and calculating gain/loss from one month earlier relative to the monthly return of the money market fund. If, and only if, the monthly return is less than the money market return is the difference in return (StrategyMonthlyReturn - M.M.MonthlyReturn) squared and added to a TotalVariationSquared value. The TotalVariationSquared is then divided by the total number of days. By taking the square root of this value we get the Downside Deviation.



**SectorSurfer**<sup>®</sup>  
Investment Strategies To Ride Sector Waves



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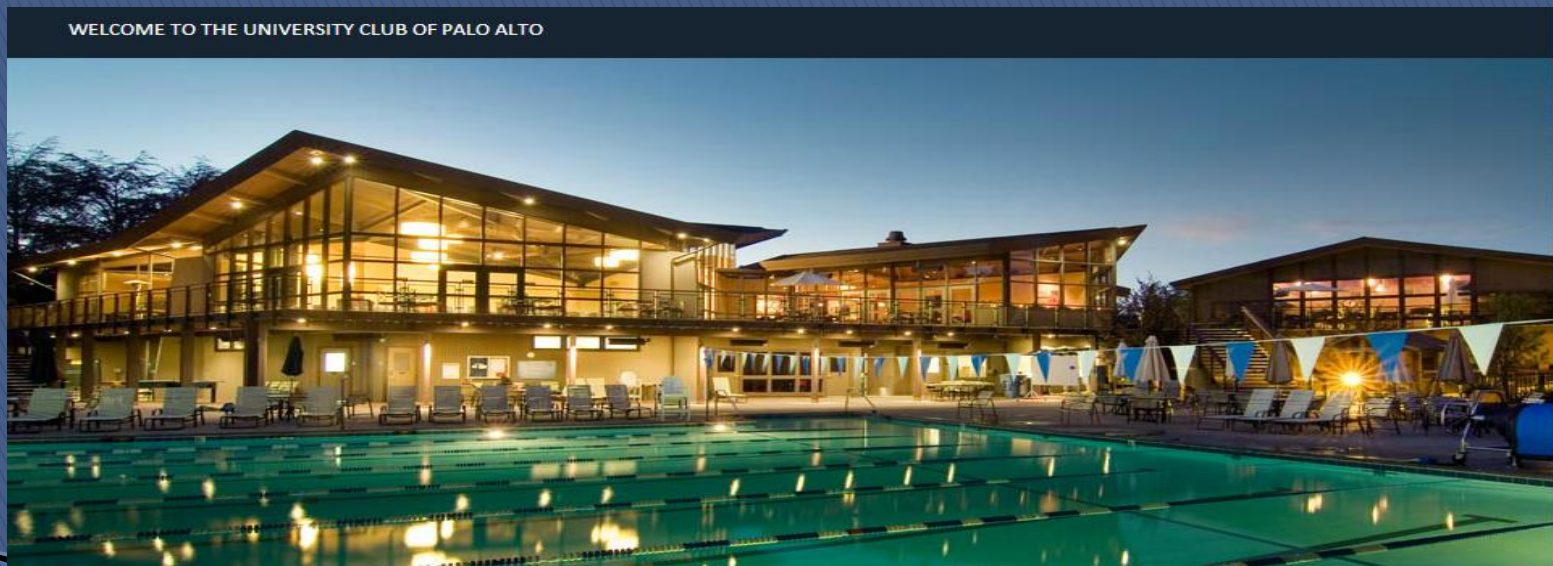
# Where To Find This Meeting's Presentations?



- ▶ Joe and Glenn's presentations will be uploaded to Joe's website: "InvestorsHELP.net",
- ▶ Go to "SectorSurfer" page at the website.
- ▶ Approximately 55+ Videos now available for free:
  - Presentations by Scott Juds (16 videos)
  - Why I Use SectorSurfer.com
  - Signing Up At SectorSurfer, Subscriptions Available,
  - Data Mining Using JIVE (Joe's Information Vault For Everyone) (3 videos)
  - And many more.

# Special SS Meeting – May 2014

- ▶ Scott Juds Coming To Silicon Valley
- ▶ Monday, May 19<sup>th</sup>, at 6:30 PM
- ▶ University Club of Palo Alto



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# RisingStar Coming in May 2014

**Email: Scott Juds to SectorSurfer Joe**

I am furiously burning the candle at both ends to have RisingStar ready for introduction in May, and that will be the highlight topic both at my May 15<sup>th</sup> presentation to the San Diego Chapter and the May 17<sup>th</sup> presentation to the LA Chapter (where they have given me both speaker slots). While there is a lot that cannot be said about RisingStar until all the pieces really do come together, there is sufficient evidence and experimental results to expect that RisingStar will represent a fundamental change in how stock Strategies operate and perform – a change that I would represent as fundamentally equal to the importance of the fundamental basis for SectorSurfer. It will remove all of the “hind sleight credibility” problems that exist with current TopDog Stock Strategies. What I am saying to you is that this is will not be a trivial “how do you do – let me tell you about the same old stuff” kind of presentation. While I probably will (and should) cover the basics for newbies, any of your group that invests in stocks will not want to miss this.

**RisingStar Coming To SectorSurfer!**

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# AAII (AI Z's) Work Also Available

## March 2014 Videos From AI Zmyslowski

More videos from AI Z. are also available here. >>>

AL Z. -- 2013



**Title:** Computerized & Mechanical Investing -- March 2014  
**Speaker:** AI Zmyslowski  
**Description:** Want to learn more about computerized investing and/or mechanical investing? Want to learn how to make computers generate profits for you? If so, this video is for you. This presentation is the kick-off of the March 2014 meeting of the Computerized Investing and Mechanical Investing Group of Silicon Valley. **(SLIDES AVAILABLE BELOW.)**



<http://investorshelp.net/al-z---mar-2014.html>

The Stocks That Doubled  
Experts Favor These Stocks Today. Sign Up For This Free Report Now!



**Title:** Global Tactical Asset Allocation (Part 1 of 3)  
**Speaker:** CC Lin  
**Description:** Want to obtain higher returns using GTA while reducing the volatility of your financial returns? If so, this informative video can help you accomplish this. It was presented by CC Lin during a monthly meeting of the AAII Silicon Valley CI-MI Group in March, 2014. This is Part 1 of a 3 Part series. **(SLIDES AVAILABLE BELOW.)**

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# Time for Questions and Answers?



## Thank You!

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