

SectorSurfer Portfolio Design Contest

Enter by November 28 2013

Why a portfolio design contest? Because sharing your creativity and wisdom is a noble thing. And, there is nothing wrong with a little recognition and a few trinkets to make it more fun.

One Grand SurfMaster Prize:

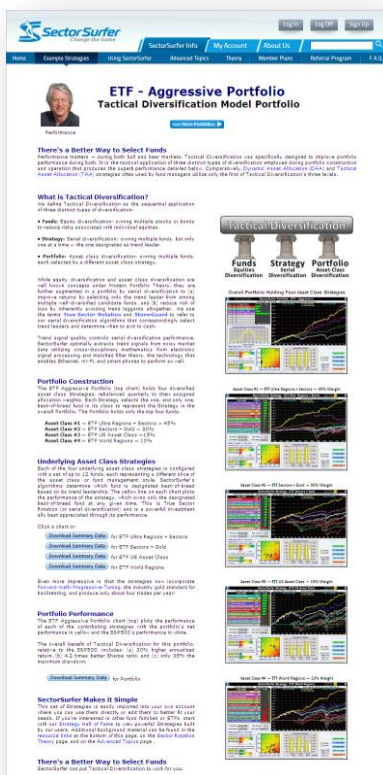
- An all expense paid Ego Trip for you and your portfolio. True immortalization with top billing on the Model Portfolios Page, and a private portfolio page as a shrine to your wisdom.
- An embroidered SectorSurfer polo-golf shirt. Not only is it marine blue, but it has a pocket!
- The amazing designer SectorSurfer coffee goblet laden with sage investment wisdom.

Ten SurfMaster Prizes:

- An all expense paid Ego Trip for you and your portfolio. True immortalization on the Model Portfolios Page, and a private portfolio page as a shrine to your wisdom.
- The amazing designer SectorSurfer coffee goblet laden with sage investment wisdom.

Many SurfPro Prizes:

- The amazing designer SectorSurfer coffee goblet laden with sage investment wisdom.
- Be immortalized on the SurfPro Portfolio page of designers who've clearly got it going on!



Portfolio Design Contest Rules

- 1-a. Mutual fund and ETF portfolios must contain 4 or 5 Strategies.
- 1-b. Stock Strategies must contain 5 Strategies.
- 1-c. Hybrid Strategies/Portfolios allowed if you can justify it.

- 2-a. Standard Strategies shall have at least 6 ticker symbols with at least 10 years of data.
- 2-b. Ultra ETF Strategies shall have at least 6 ticker symbols with at least 6 years of data.
- 2-c. Beyond those six ticker symbols, others may have shorter data spans.
- 2-d. Mutual funds must be accessible retail investor class funds.
- 2-e. ETFs and stocks must trade \$20M or more in volume daily.

- 3-a. All Strategies must use FWPT BornOn 1/1/2010 or earlier.
- 3-b. Strategies with earlier BornOn dates will be judged as superior.

- 4-a. Categories are not limited to my imagination, but should be something practical and interesting, such as funds of a mutual fund company, aggressive/moderate/safe ETFs, or some other worthy theme. Stock Strategies will be harshly judged because of their inherent non-rotation and selection in hindsight. Thus be sure to make a good case for why a set of stocks has been assembled in a Strategy.
- 4-b. Although Chief Surfer has seeded the pages with a few Portfolios, feel free to improve upon and replace those Portfolios with better ones of your own – provided they are judged to be more than a trivial improvement.

- 5-a. Judged most importantly by its desirous steep smooth yellow line – for its class.
- 5-b. Judged by its logical organization and execution practicality.
- 5-c. Judged by Chief SectorSurfer and selected volunteer power users.
- 5-d. Judged to have higher value with less redundancy (where one market index, one treasury/bond fund, and one short market index fund per Strategy don't count).

- 6-a. Submit portfolio designs (2 maximum) by email to sjuds@sumgrowth.com.
- 6-b. Submit Strategy-IDs for each Strategy and for the Portfolio.
- 6-c. Submit a short paragraph of 100 words, or so, about its design features
- 6-d. A mug shot, real name, and city must be submitted to qualify for a SurfMaster page.
- 6-e. All submissions must be received by the end of Thanksgiving day.
- 6-f. We hope to get through evaluating them all before Christmas.

Submit something our judges believe reasonably stands shoulder to shoulder with the portfolios now posted, and you will be honored with SurfPro status!

Be noble, share your wisdom, bust your buttons, and surf well.

Scott Jude