

INVESTORS HELP

SectorSurfer Users Group Meeting 6 Nov 2013

Sector Surfer



Joe Gruender Jr.

"www.InvestorsHELP.net"

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SectorSurfer Meeting Agenda – 6 Nov 2013

- Introduction by SectorSurfer Joe
- What's Surfing With SectorSurfer?
- Presentation by Al Zmyslowski
- Finding Additional SectorSurfer Information
- General Discussions on SectorSurfer

SectorSurfer Users Group Welcomes You!



- ▶ Our 6th SectorSurfer Meeting – Started in Nov. 2012
- ▶ Meet ~ Every Two Months, Our First Anniversary!
- ▶ “SectorSurfer Users Group” on GoogleGroups.com
- ▶ Check “Welcome Letter” for latest announcements.
- ▶ Current Subscribers to SS Users Group – 181 to 197
- ▶ Any “new” members here tonight – last 2 months?
- ▶ SS Videos available on at “InvestorsHelp.net”
- ▶ “<http://investorshelp.net/sectorsurfer-meetings.html>”

"www.InvestorsHELP.net"

Where Are The Answers?

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](#) ▶

www.SectorSurfer.com

"www.InvestorsHELP.net"



What's Surfing With SectorSurfer? Current & Coming Events

"www.InvestorsHELP.net"

SectorSurfer[®]
Investment Strategies To Ride Sector Waves

What's Surfing
With SectorSurfer?

SectorSurfer Nov. Newsletter



SectorSurfer
Change the Game

Shoot The Curl
Monthly Perspective

Did you get your copy?

"www.InvestorsHELP.net"

Perspective: Health Care, Portfolio Contest, & Amazon

Nov 04, 2013

Dear Joe,

What the Charts Say Now

In spite of our problems balancing the budget and the serious glitches in the roll out of Obamacare, the market clearly believes those problems will be overcome and the sun will continue to shine. Expect more of the same until such time as a yet unknown more serious problem confronts us.

Healthcare - Be Prepared

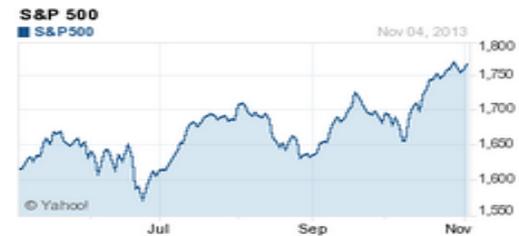
A few years ago I was not pleased about the rapid rise in gasoline prices. I'm sure I said a few negative things about those whom I believed were draining my wallet and burdening the economy. But it wasn't long before I noted SectorSurfer had me in FSESX, Fidelity Select Energy Services, making money faster than the gas pump was draining it.

That was a lesson well learned. While I felt helpless in my inability to change anything about rising world oil prices, my pain at the pump was well compensated — the trend really was my friend with FSESX.

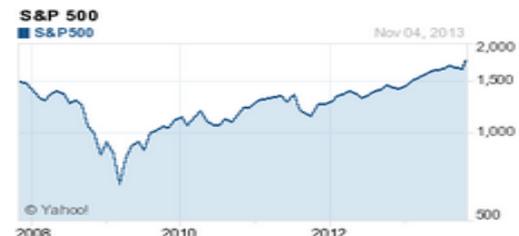
So, how does this relate to the ACA (Affordable Care Act)? While the news of its disastrous website debut and stories of cancelled plans and doubling rates continue prominently, the technical problems will get fixed, pricing will mostly sort itself out, and it's likely that some portions of the law will be rewritten. It's here to stay. But, are your Strategies prepared?

Why should cancelled plans and increased prices be a wakeup call for investors? Consider this: If your customers can't jump ship for any competitor's product at a lower price (because the government outlawed selling low priced products to new customers), then you can obsolete all your low price products and force customers up to higher priced products without losing them. Might that affect profitability? Might that explain a few things? Apply the lesson.

Your Strategies would be well prepared to participate if they contained a healthcare fund. Notably, the IYH healthcare ETF has already outperformed the S&P500 by 10% this year.



6-Months



6-Years





Sector Surfer
Change the Game

Shoot The Curl
Monthly Perspective

Model Portfolios

Many have requested that we create a page with model portfolios — where a portfolio is defined as a collection of Strategies, each of which manages one of your buckets of money. Particularly for stock Strategies, we have promoted the concept of "[Post Surfing Diversification](#)", to reduce volatility risk of individual stocks through owning multiple stocks — each selected by a Strategy as its trend leader. The blue "Model Portfolios" button to the right can now be found at the top of the Example Strategies page and the Strategy Hall of Fame page. It links to the new Model Portfolios page. There we introduce the broader concept of "Tactical Diversification" for Portfolios, which is the sequential application of three types of diversification, including "serial diversification", to produce optimal portfolio performance.



[Learn More About StormGuard](#)

See Also:
Model Portfolios

[Click to visit Model Portfolios page.](#)

See Tactical Diversification: "<http://investorshelp.net/sectorsurfer.html>"

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Advanced Topics

Take SectorSurfer to the Next Level



Portfolio Charts

- Post-Surfing Diversification
- How to Make a Portfolio Chart
- Allocation & Symbol Calculator
- Strategy Performance Bar Chart
- Return Probability Distribution
- Probability of Loss - Risk

Investment Topics

- Take Control, It Urgently Matters
- Selecting Funds, ETFs and Stocks
- The Prudent Investor Rule
- Stocks versus Sectors
- Minimums, Hold Times, Fees
- Fund Availability Depends ...

Custom Strategies

- Great Strategies Overview
- Clones versus Sectors
- Common Mode Noise Reduction
- How to Build a 401k Strategy

Advanced Options



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Monthly Perspective

Portfolio Design Contest - Share Your Wisdom

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. Have your Portfolio immortalized on the Model Portfolios page, and/or win our amazing designer SectorSurfer coffee goblet laden with sage investment wisdom.

[Download Portfolio Design Contest Rules PDF](#)

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The Subscription Options are:



FREE Subscription





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!



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Portfolio Design Contest Rules

- 1-a. Mutual fund and ETF portfolios must contain 4 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. Mutual funds must be accessible retail investor class funds.
- 2-d. 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



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Monthly Perspective

Amazon Subscription Conversion (a repeat reminder)

Google Wallet ceases operation about November 22nd. When your last Google Wallet subscription payment eventually expires, you will be directed to the Account Information page where the 3rd column will look as shown, above right. You can either select the Amazon Replacement option and continue through checkout with Amazon, or change your subscription by clicking the brown Cancel Subscription button and selecting an alternative. Changing a subscription before it expires can also be done at any time without losing any time/value remaining on the current one. With Amazon it's easy.

- FREE Subscription
- Monthly Subscription
- Yearly Subscription
- Amazon Replacement



How Can I Change My Subscription Type?

How Do I Change My Credit Card Information?



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Orlando AAI Investor Conference (a repeat reminder)

SumGrowth Strategies will have a trade show booth at the Orlando AAI Investor Conference starting Friday, November 15. Please come see us there. For conference information, click the AAI Conference image to the right.

We also have a 90-minute workshop scheduled for Saturday morning November 16, described as follows:

Adaptive Asset Class and Sector Rotation Strategies

Since economists really do point in all directions, prudent investors must devise strategies that automatically adapt to changes in the economy, interest rates, favored sectors and favored world regions. We'll examine mutual fund and ETF example strategies for both asset class rotation and sector rotation that perform well, even with forward-walk-progressive-tuning, the industry gold standard for strategy backtesting.

We plan to convert the presentation to some form of video after the conference for those interested in the topic.

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- Revert to Free Account -

Delete Entire Account
- Leave Nothing Behind -

I understand SectorSurfer is an automated data analysis tool and SumGrowth Strategies provides no personalized professional financial advice.

Account Information - Amazon Conversion

The 2013 AAI Investor Conference

Friday, November 15 – Sunday, November 17, 2013

Loews Royal Pacific Resort in Orlando, Florida



There's something for every conference—from fine-tuning mastering the latest concepts about investing from some of the industry.

[CONFERENCE SCHEDULE »](#)

Act Fast! Space is Limited

AAI Investor Conference - Click for details.



AAll National Conference

Nov. 15 to 17, 2013
Orlando, Florida
Visit SectorSurfer Booth

"www.InvestorsHELP.net"



AAll National Conference

On Nov. 16th, 2013

Attend SectorSurfer Workshop

Workshop Topic

Adaptive Asset Class and
Sector Rotation Strategies

"www.InvestorsHELP.net"



AAll National Conference
Orlando, FL – Nov. 15, 2013
SectorSurfer Workshop

Workshop Description

Since economists really do point in all directions, prudent investors must devise strategies that automatically adapt to changes in the economy, interest rates, favored sectors, and favored world regions. We'll examine mutual fund and ETF example strategies for both asset class rotation and sector rotation that perform well, even with forward-walk-progressive-tuning, the industry gold standard for strategy backtesting.

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Possible Changes – Comments?

CURRENT FORMAT

Active Strategies: These Strategies generate Trade Alerts. Click the blue S

No.	Strategy Information	Fund or Stock Ticks
1	Name: <input type="text" value="SSJ Best Select"/> Notes: <input type="text" value="Developed using JIVE."/>	XLK XLI OIH EWH EWC EWS
2	Name: <input type="text" value="SSJ Super Safe Fidelity"/> Notes: <input type="text" value="Clone of My-Strategy #2"/>	FBMPX FSVLX FLVCX FSCGX FCPGX FSAVX

PROPOSED FORMAT

Active Strategies: These Strategies generate Trade Alerts. Click the blue S

No.	Strategy Information	Fund or Stock Ticks
1	Name: <input type="text" value="ETF Ultra Market + Sectors"/> Stats: <input type="text" value="Score: 122.2 Safety: 101.3"/>	SSO UVG UKW XLF XLK XLE
2	Name: <input type="text" value="ETF Black Gold Hedge"/>	OIL OIH GLD IDY

Hover Over Name Box To Get Notes

Hover over stats box to get stats.

What stats would you like to see???

Presentation By AI Zmyslowski



Sector Surfer[®]
Investment Strategies To Ride Sector Waves

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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 accomplish this using mutual funds, exchange traded funds (ETFs), individual equities, or a combination of 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 so we have available an excellent platform for exchanging information, thoughts, strategies, and answer your questions as we learn and implement SectorSurfer together.

Join us so we can grow together and prepare for a profitable future using SectorSurfer. We encourage you to learn the details of SectorSurfer at "www.sumgrowth.com." Share your comments at this users group so we all benefit from learning and using SectorSurfer.

SectorSurfer has an excellent Referral Program for signing up new members to their website. Check it out!

Don Kinell's September presentation entitled: "A Look At 10 Balanced Premium Portfolio Strategies" has now been viewed almost 200 times at: <http://investorshelp.net/sectorsurfer.html>. Viewers have now requested a copy of the list of symbols used by Don to develop his strategy and also a copy of the results for his strategy. Both documents are now available at: <http://investorshelp.net/presentation-slides.html>.

Our 6th SectorSurfer Users Group meeting is now scheduled for Wednesday, Nov. 6th, at 6:30 PM at Holder's Country Inn, 998 S. De Anza Blvd, San Jose, CA (Across from Home Depot). Restaurant Tel: (408) 244 - 2798. I plan on making videos available from this meeting at: www.InvestorsHELP.net

Enjoy,
SectorSurfer Joe



Joe Gruender
Users Group Owner



Scott Juds
Chief SectorSurfer

Where To Find This Meeting's Presentations?



- ▶ Joe and Al's presentations will be uploaded to Joe's website: "InvestorsHELP.net",
- ▶ Go to "SectorSurfer" page at the website.
- ▶ Approximately 95+ 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.



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Joe Gruender Jr.

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Videos Discussion About



Introduction to SectorSurfer by Scott Juds [Investors Help]

60 views 3 weeks ago

I was so impressed with this software for managing my investments, I started the SectorSurfers Users Group on "Googlegroups.com." Check it out and see what I mean.

SectorSurfer is an automated investment advice tool utilizing the cross-discipline sciences of Signal Processing Theory and Matched Filter Theory from the field of electronic communications. SectorSurfer is better than other software for extracting trend signals to determine the one best trend leader to own next month....

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Sectorsurfer



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"Where's My Email?" SectorSurfer Users Group [In...

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Why I Use SectorSurfer [Investors Help]

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SectorSurfer Creating LMRIG Strategies (Part 1) [Investo...

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Time for Questions and Answers?



Thank You!