



Sector Surfer
Change the Game

Shoot The Curl
Monthly Perspective

System Upgrade Complete - Important Feature Details

Dec 30, 2013

Dear SectorSurfer,

These Advanced Features are Optional

If you prefer simplicity, please just read the first two paragraphs. But, if you are a power user interested in more powerful features please read the entire newsletter.

Proper Display May Require Page Refresh

Some browsers do a poor job of detecting the presence of revised files for a web page, using files stored locally instead of downloading the new revised versions. While Internet Explorer is usually free of problems, Chrome and Firefox are notoriously poor in this regard. So if your Account Information page is blank or strange, or your Sandbox Strategies number from 11 instead of from 31, and all your Sandbox Strategies seem to be gone, then you will need to refresh the page. Clicking the circular arrow icon at the top of the browser generally forces a full refresh. Alternatively hit Ctrl-F5 on a PC, or Cmd-R on a Mac to force the refresh.

Records Page and Linked Referral Credits

Click the [Records tab](#) on the main menu to see the historic record of your subscription payments and referral credits. In the future, your subscription payments will be offset by available referral credits automatically, and this page will show the detailed split of each subscription payment.

30 Active Strategies w/New Subscription

Power SectorSurfers can now get up to 30 Active Strategies on the same My Strategies page, but it requires a new subscription type to enable this feature. See the [Member Plans page](#) for details.

Motif Portfolios

A Motif Portfolio is probably best described as your own custom themed ETF — basically a basket of up to 12 stocks (or ticker symbols) that you believe are meaningful together. The Motif Portfolio's resultant output is the simple equally weighted average of the performance of its constituent ticker symbols. You could create your own sector fund for Space Exploration, Organic Food, or Social Media, for example. A Strategy is designated as a Motif Portfolio simply by using "P:" in the start of its name. It can then be referenced/used in another of your Strategies just as if it were an ETF. Motif Portfolios are free because they render no buy/sell decision, and may live in either the Active Strategies or the Sandbox Strategies areas. (Good idea Al Z!)

Portfolios of Strategies

A Portfolio of Strategies is what SectorSurfer already had, but differs from a Motif Portfolio only in that its special ticker symbols refer to another of your Strategies as opposed to a stock or ETF. To accommodate the new system with 50 Strategies (30 Active and 20 Sandbox) we had to change the syntax for referring to another Strategy. During the conversion process, your Strategy special ticker symbols should have been automatically converted to the new format, which is Snn-w instead of S#n.w as previously used. The nn refers to the strategy number and does not include a leading zero. Portfolios can now reference Strategies anywhere in the Active or Sandbox Strategies area, and the Portfolio itself can be located in either area as well. Strategy Portfolios are also free because they render no specific decision.

Strategy of Strategies

A Strategy of Strategies uses our special ticker symbols to refer to your other Strategies. As with a normal SectorSurfer Strategy, it will pick the one, and only one, best performing Strategy from among up to 12 candidates. In fact, you can mix normal ticker symbols with the Strategy ticker symbols if you like. While you can employ the Snn-w format used to reference Strategies in a Portfolio of Strategies, the "w" parameter will

be ignored as it is not used in a Strategy of Strategies. Alternatively you can use the format of SSSnn, for SectorSurferStrategy number nn, where nn does not have a leading zero if it is only a single digit. A Strategy of Strategies does make buy/sell decisions and thus is not free. Finally, all referenced Strategies must come before (lower number than) the Strategy of Strategies because your Strategies are processed sequentially every evening and all referenced Strategies must be processed before the Strategy of Strategies in order to produce meaningful results.

Online Documentation Will Catch Up

For the moment, this is your documentation for the new features. Over the coming days we will integrate it into the online documentation. But hey, you guys are do-it-yourself types that don't read the instructions anyway — at least until you break the knob off. So I figure you're already good to go.

Surf Well and Prosper,



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