Contents

**Disclaimer:** This is NOT investment advice, just general help and opinions. Please check with a registered investment advisor before making any investment decisions. This document may contain errors. Chapman Advisory Group LLC employees are not investment advisors. Please review:
 https://www.stockconsultant.com/disclaimerpage.html

The information/examples presented will be for long stock trades.

Prerequisites

- Understanding candlestick charts
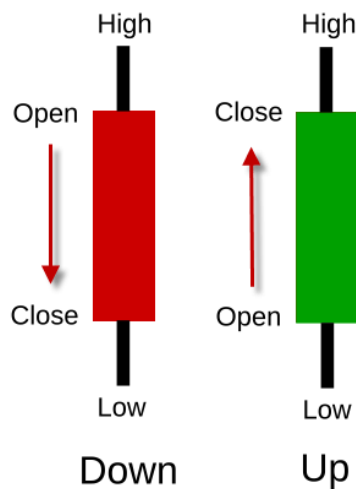
Candlestick Chart

- How to Read Candlesticks
- Bullish Candlesticks
- Bearish Candlesticks

- Stock support and resistance
  - Support and Resistance

- Stock volume
  - Understanding Volume

- Basic chart patterns
  - Triangle
  - Bull flag
  - Bear flag
  - Rectangles
  - Double Bottom/Tops
  - Breakouts

- Stock trade basics
  - Stop Loss/Limits
  - Profit/Loss Ratio
  - Diversification

Trade Types

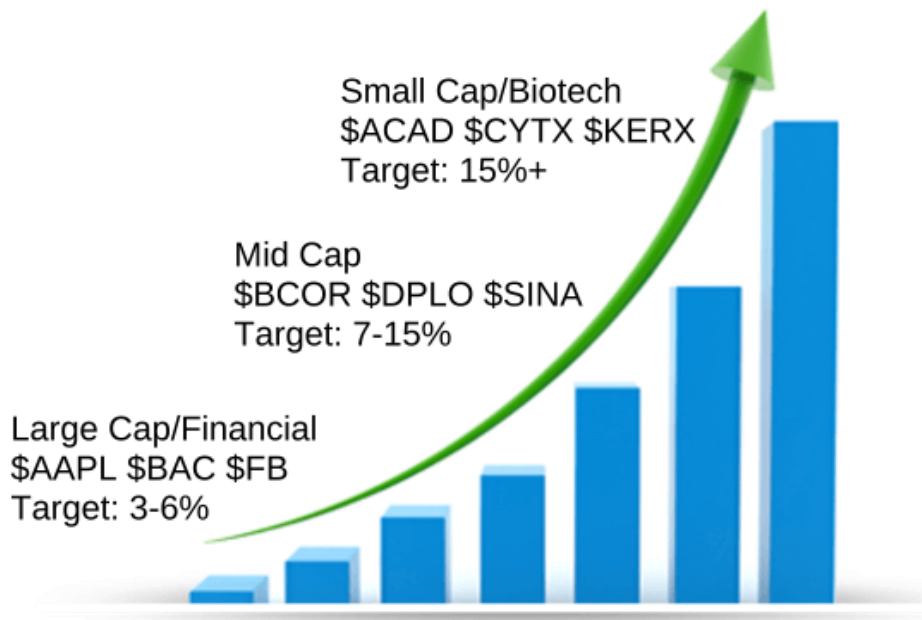**Possible Trades   Breakout ✓   Long ✗   Short ✗**

- The StockConsultant is useful in finding 3 types of long trades: **momentum (with trend), bottoms and breakouts**.
- Long trades listed under possible trades corresponds to bottom and momentum (with trend) types at or near support.
- A breakout trade is also a type of long trade which is triggered when price moves above the breakout level.

Trade Timeframes

- Typical timeframe for a momentum trade to reach target is from 1 to 4 weeks (5-20 trading days).
- Typical timeframe for a breakout trade to reach target is from 1 day to 1 week (5 trading days); this is a short term event.

Trade Profit Expectations

- Long momentum and breakout trade profit will correlate to a stock's size and industry/sector. The lowest profit on large cap (price 25+, volume > 1Mil), medium profit on mid cap (price 12+, volume 300k-1Mil) and high profit (and high risk) on small cap (price <12, at any volume) stocks.

Small Cap/Biotech
$ACAD $CYTX $KERX
Target: 15%+

Mid Cap
$BCOR $DPLO $SINA
Target: 7-15%

Large Cap/Financial
$AAPL $BAC $FB
Target: 3-6%

Momentum (with Trend) Long Trade

Overall

95%
Extreme Bullish

Trade Quality ❓

95%

Long

45%

Short

Long Trade
Target 1: **16.48**   Profit: **30.3%**   Stop/Trailing Stop: **11.93**
Loss: **5.7%**   P/L ratio: 5.3 : 1 - **Excellent**
Target 2: **17.62**   Profit: **39.3%**   P/L ratio: 6.9 : 1 - **Excellent**   *Extreme rally*

≣ Possible Trades **Breakout ✗ Long ✓ Short ✗**
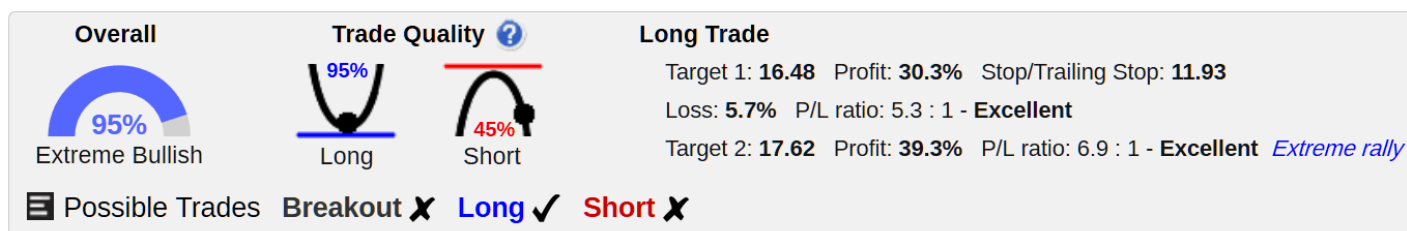
- Momentum stock trade setups depend on overall and trade quality indicators.
- A good long trade setup has an overall indicator => 65% and trade quality => 70%.
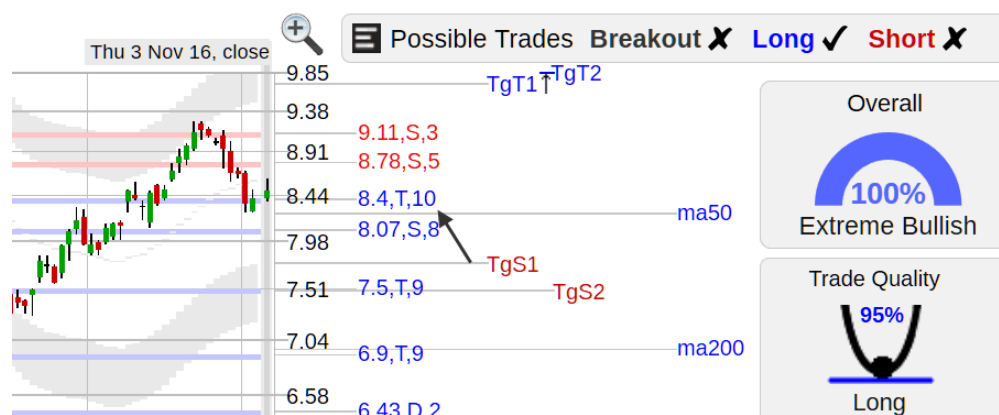- The long trade detail provides: target 1 and 2 (for an extreme rally); stop, P/L (profit to loss) ratio and rating (excellent for P/L of 3 or greater).
- Typical timeframe for a momentum trade to reach target is from 1 to 4 weeks (5-20 trading days).

- **Trade Quality indicator**: The blue line represents support and the black dot generalizes the price movement. This corresponds with the stock price at 8.4 triple support.

Overall Indicator

This indicator represents the overall picture over the past 2-4 months. Momentum and bottom trade setups require mild bullish readings of 65% or greater.

- **Good Overall**
  - Uptrend
  - Not overbought
  - Typical pullback
  - Optimal long entry area, etc...

Trade Quality Indicator

The trade quality is a short term (1-2 weeks) entry indicator. Momentum and bottom trade setups require good trade quality readings of 70% or greater.

- **Good Trade Quality**
  - At support
  - Tight stop
  - Good profit
  - Good target potential (low number of resistance areas to target) , etc..

Highest trade quality (90-100%) occurs in a very narrow price range giving the tightest stop and maximum trade profit.

Stocks that are in a longer (2 week+) narrow price area can have **both high trade quality for long and short trades**. In this case look at other indicators for a hint of future direction (in uptrend? overall? other indicators?) to decide whether to take a long or short trade.

- As stock pullbacks to a support area, the trade quality indicator's black dot (representing price movement) will also travel down the left side from 0% (falling price; poor trade quality), 50%, to 90-100% at the highest trade quality at support (blue line represents support). As the stock rallies off support, the trade quality indicator's dot will move back up the right side, from 90-100%, 50% to 0% (rising price, far from support, poor trade quality).
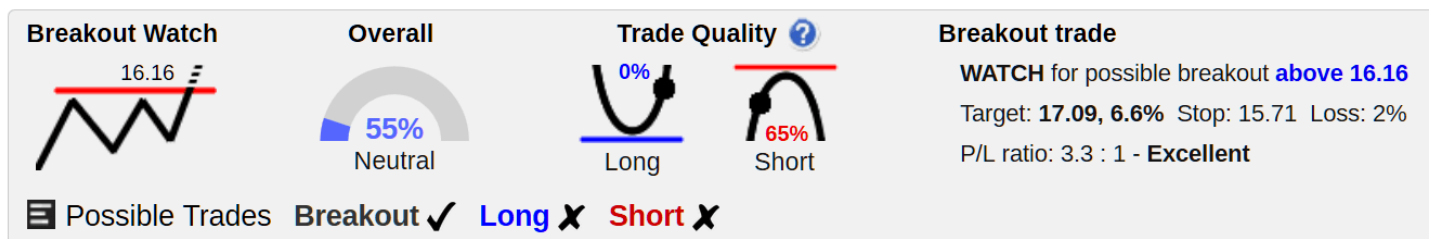
Bottoms

- Bottom long trades (at single, double, triple support) can be very risky, since there is also a breakdown watch.

Trade Quality improves from 50% to 90% as price moves lower to support.
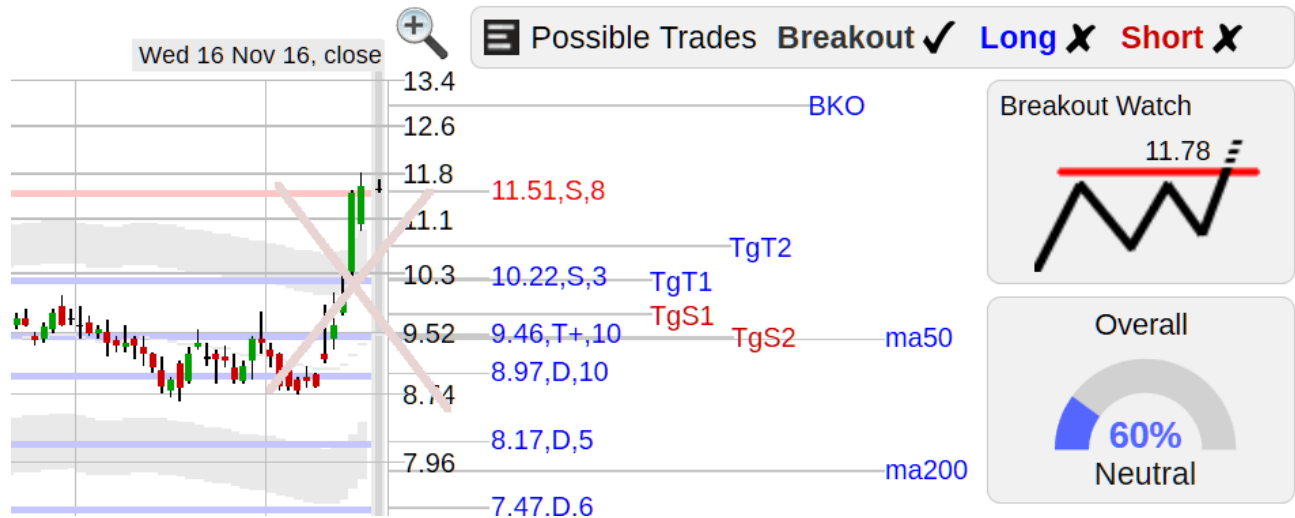
Breakouts

- On the breakout indicator, the red line represents resistance, along with a breakout level price. If the stock price moves above this level, it represents a confirmed breakout.
- Since breakouts occur at resistance, and sometimes near top of ranges (new highs), the **overall and trade quality indicators will usually be poor**.
- When you have a flat top breakout or a bottom breakout, the overall and trade qualities may be good.
- The breakout trade provides a target, stop and P/L (profit to loss) ratio and rating (excellent for 3 or greater).
- The typical timeframe for a breakout trade to reach target is from 1 day to 1 week (5 trading days); this is a short term event.

When price moves above the breakout level shown on the indicator, the stock may rally quickly, as there is no resistance above to halt its advance.

Breakout Types

- **The least reliable breakout** is the run up breakout. The stock has already rallied (strong/extreme short term direction) and now needs to consolidate at resistance (11.51) before making another breakout move. The consolidation may create a bull flag prior to another breakout.

- Indicators/price actions that have a **negative effect on breakouts**:
  - Overbought indicator: a 7 or higher; stock has had a good 1-2 month move higher.
  - Intermediate Trend: An unsustainable uptrend; stock has been in a strong uptrend for 4 months or more.
  - Short term direction: Strong/extreme; a large 1-2 week rally has occurred.
  - Recent breakouts within the past month that had large volume may lead to exhaustion on the current breakout.

- The **most reliable breakout patterns**:
  - Short run
  - Narrow price area
  - Flat top (bull flag)
  - Bottom type

- **Short Run Breakout**

Thu 10 Nov 16, close

Possible Trades **Breakout** ✓ **Long** ✗ **Short** ✗

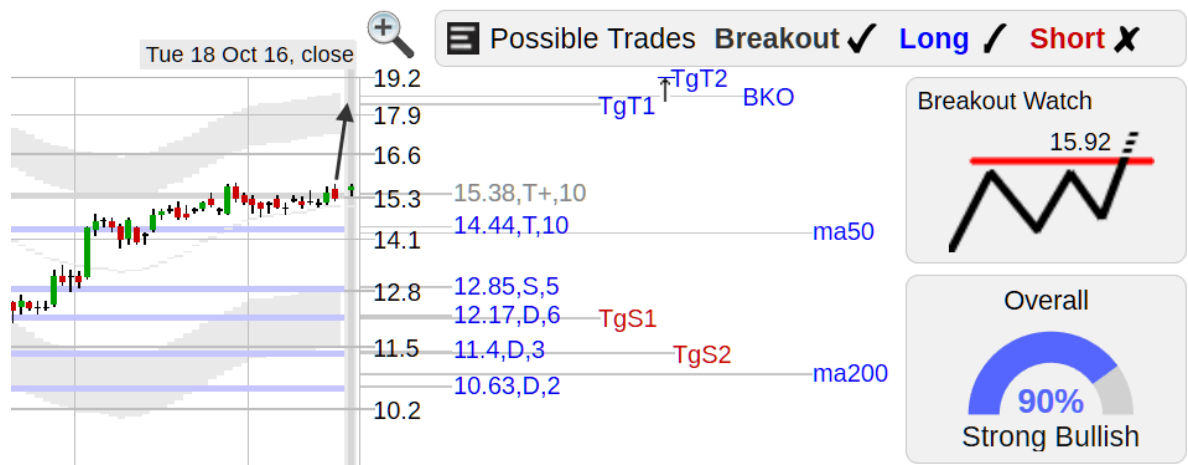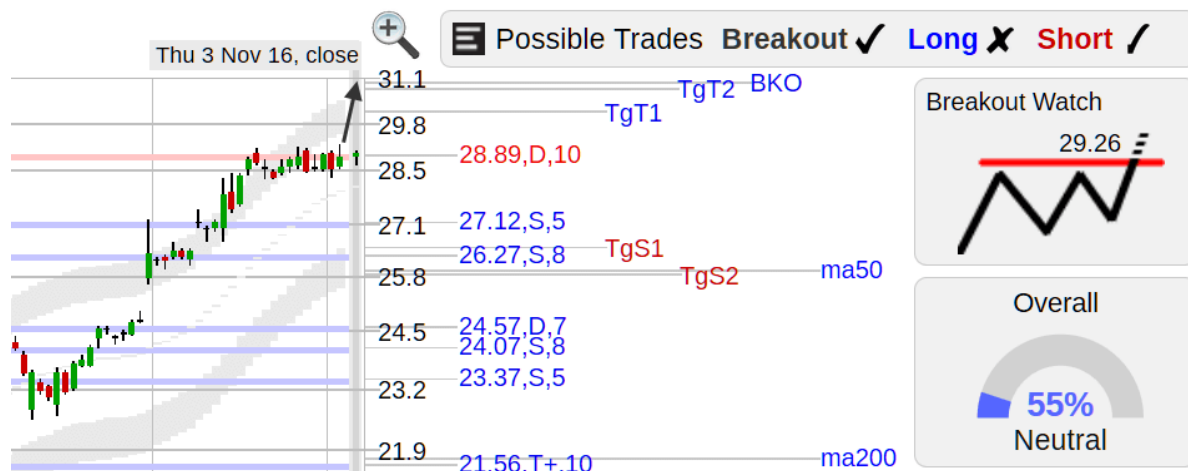|	
47.5	
45.9	TgT2 BKO / TgT1
44.2	43.94,S,8
42.6	42.96,S,8
	41.65,S,5 ma50
41	40.68,T,10 TgS1 / TgS2
39.4	39.43,D,6
37.7	37.42,S,3 ma200
	36.87,S,1
36.1	36.26,D,10
	35.6 T+ 10

Breakout Watch
44.38

Overall
50%
Neutral

- Rally just getting started (short term direction up), and volume may be increasing.
- Important support nearby at 42.96.
- Note: A high trade quality long momentum trade may be available at 42.96 support.

- **Narrow Price Area Breakout**

Fri 4 Nov 16, close

Possible Trades **Breakout** ✓ **Long** ✓ **Short** ✗

29.1	TgT2
27.2	TgT1 BKO
25.2	
23.3	23.37,T,3
21.3	21.77,S,8 ma50
19.4	18.82,S,8
17.5	TgS1 / TgS2
15.5	15.15,S,5
	14.18,D,10 ma200
13.6	

Breakout Watch
24.19

Overall
65%
Mild Bullish
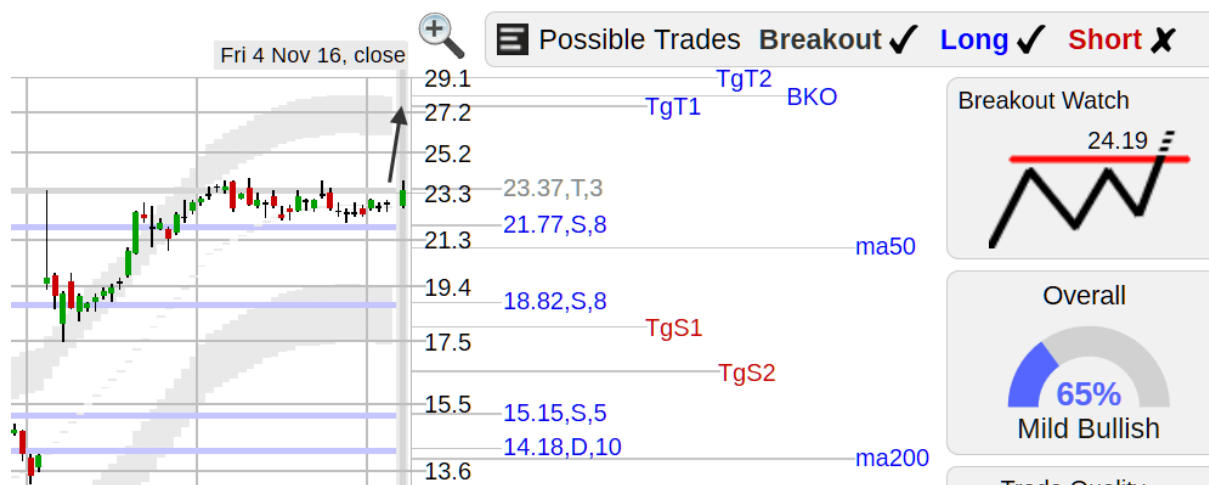
Trade Quality

- On some narrow price breakout areas, one could buy at support, with high trade quality in anticipation of a continuation in the direction of the breakout.

- **Flat Top Breakout**

Possible Trades Breakout ✓ Long ✗ Short ╱

Thu 3 Nov 16, close

31.1
29.8   TgT1
28.5   28.89,D,10
27.1   27.12,S,5
25.8   26.27,S,8   TgS1
24.5   24.57,D,7
        24.07,S,8
23.2   23.37,S,5
21.9
        21.56,T+,10

TgT2 BKO

Breakout Watch
29.26

Overall
55%
Neutral

ma50
ma200

Possible Trades Breakout ✓ Long ╱ Short ✗

Tue 18 Oct 16, close

19.2
17.9   TgT1
16.6
15.3   15.38,T+,10
14.1   14.44,T,10
12.8   12.85,S,5
        12.17,D,6   TgS1
11.5   11.4,D,3   TgS2
        10.63,D,2
10.2

TgT2 BKO

Breakout Watch
15.92

Overall
90%
Strong Bullish

ma50
ma200

  - Flat top (bull flag pattern) breakouts have well defined breakout levels and stops.

- **Bottom Breakout**

Possible Trades Breakout ✓ Long ✗ Short ✗

Tue 8 Nov 16, close

21
20.3
19.5   19.45,D,3
18.8   18.86,T+,10
        18.19,D,10
18   17.72,S,2
17.3   TgT2 BKO
16.5   TgT1
15.8   15.54,T,6
15   14.8,T,10
14.6

ma200
ma50

Breakout Watch
15.78

Overall
70%
Mild Bullish

Trade Quality
35%

  - Bottom breakouts may have large upside resistance and price gaps.

Support and Resistance

Mon 20 Aug 18, 10:25 am ET

19.89,S,8
18.55,S,3
16.6,T,10
15.23,D,10
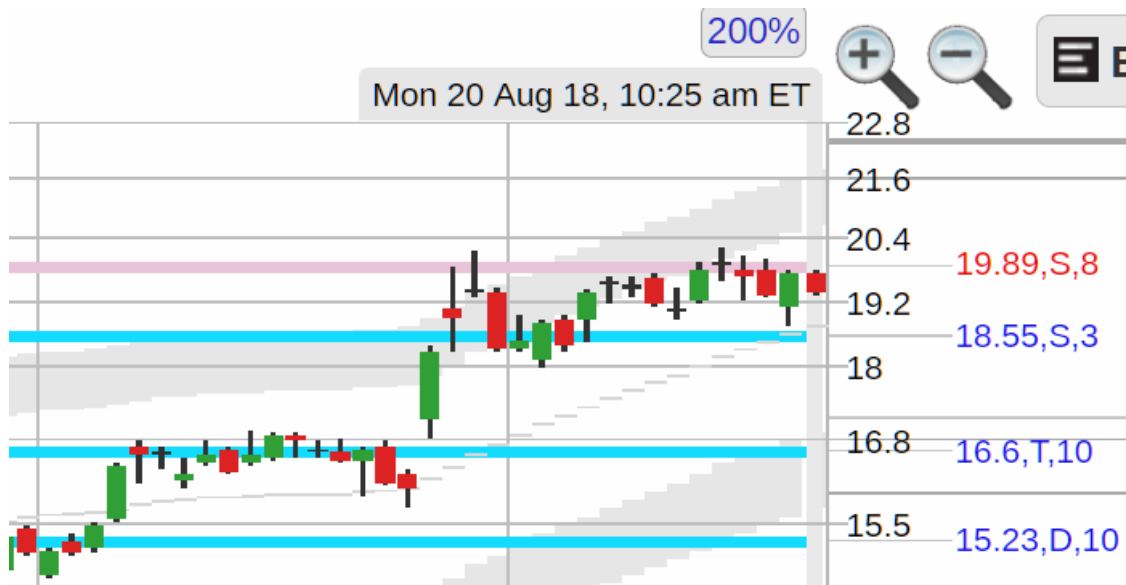
- Blue lines are support and red are resistance areas.
- Support is below the current stock price and resistance is above.
- Stocks pullback to support and rally to resistance.
- The number of times the stock has held or paused at a price area represents the type S (single), D (double), T (triple), T+ (triple+). The more times, the stronger the support or resistance.
- The amount of volume that occurs at the support and resistance is the strength and varies from 1-10 (greatest).

Support and Resistance Areas ☐ Hide Over the past 8 months.

Type: Number of times a stock has touched a support/resistance area, the more times the stronger the area.

Strength: Amount of volume occuring at support/resistance areas, the higher the more significant the area.

CURRENT PRICE

19.43, at resistance, **19.89** ± 0.48 type **single**, strength **8**

SUPPORT BELOW

-4.5% at **18.55** ± 0.45 type **single**, strength **3**

-14.6% at **16.6** ± 0.4 type **triple**, strength **10**

-21.6% at **15.23** ± 0.37 type **double**, strength **10**
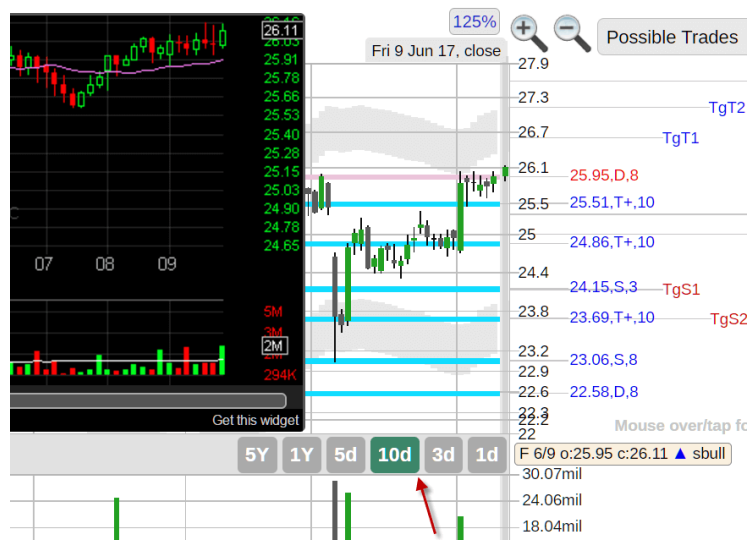
...

RESISTANCE ABOVE
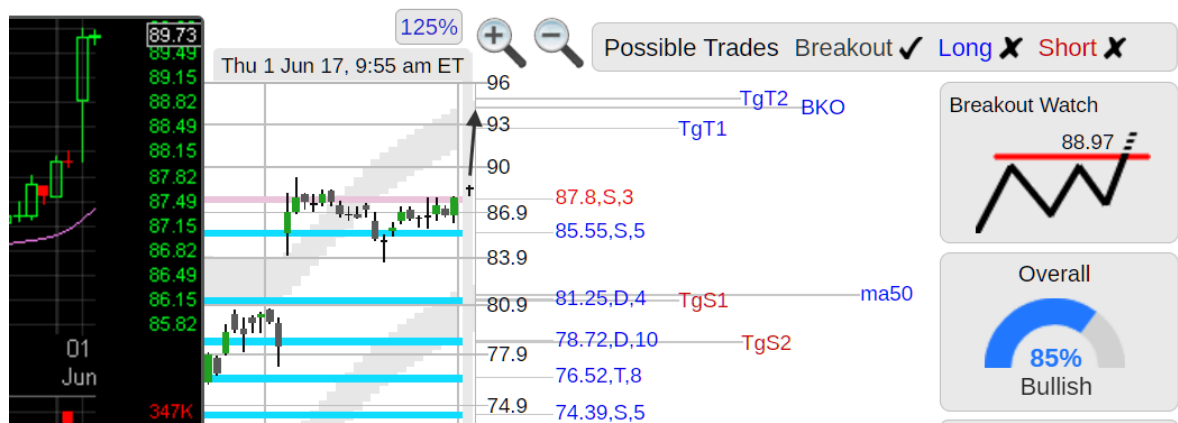
None.

Realtime Charts

Realtime chart (top of Consultant page)

Realtime overlay chart

Use the Realtime charts to detect fast opening breakouts and early buying at support for momentum longs.

Trade Tips

> **Breakout trade**
> **WATCH** for possible breakout **above 15.19**
> Target: **16.77, 11.6%** Stop: 14.48 Loss: 3.7%
> P/L ratio: 3.1 : 1 - **Excellent**

- Try to keep a stock profit/loss ratio (P/L) of 3:1 or greater. If a stock has a price Target 1 (or T2) at 12% profit, then max stop loss (stop) would be 4% for P/L ratio of 3:1. If a tighter 3% stop is available, then the P/L ratio would be 4:1. With a 10 position diversified stock portfolio and P/L ratio of 3:1 or greater, you only need to be correct 33% of the time to break even.
- Look for stocks with a target profit of 5% or greater.
- Larger capitalization and higher priced stocks will normally have target profits around 5%, while riskier stocks (under $10) have targets with up to 30% profit. For a 30% profit and P/L ratio of 3:1, the stop could run as high as 10%. In this case, to keep a constant maximum loss amount (risk), use 1/3 of the typical position size.
    - Example: For a $100k portfolio, with up to 10 stock positions of $10k, a 10% profit target and 3.3% stop loss for P/L ratio of 3:1 would return either a $1000 profit or a $330 loss. On an under $10 stock, with 30% profit target and 10% stop loss, the potential loss could run 3x higher, or $1000 on a $10k position . Limiting the high risk stock to 1/3, or $3k position size, normalizes the loss to be the same as the standard trade.
- The sweet spot for profit on medium capitalization stocks is **9 to 15%**.

- **Trade clean looking charts**

Noisy: lots of price gaps (seen on low price, low volume or foreign stocks trading on USA exchanges), hard to read price action.

Clean: less price gaps, easier to spot support and resistance

- **Price Target 1 can be conservative at times** especially if the stock has had only 1-2 big rallies or pullbacks over the past year. The more rallies and pullbacks, the more accurate price targets 1 and 2.

Email/Text Alerts

Find a service/brokerage that can save stock price alerts and send an email or text message when the stock rises above that price. This is a great way to set up alerts to trigger just before breakouts occur or near support levels.

Stock Options

- Use options, instead of buying stock to avoid the "I got stopped out," and then the stock goes your way because of a noisy price action or a temporary overnight/open gap down in price.
- Stock Option Basics
- Call Options
- For example, if you have a stock stop loss of $300 (3% of a $10k position), then you would buy a call option worth the same amount. No matter how far the stock drops, your **maximum loss (risk)** would be $300.
- On a good breakout (or bottom/momentum long rally), you may profit 70% ($210) to 400%+ ($1200+).
- Options have an expiration date a week, 1, 2, or 3+ months out. If the stock does not rise above your option strike price by expiration, then it will expire worthless and you will have a $300 loss. You are switching from a level based loss to a time based loss.
- Options let you worry less about very short term stock movements. Expiration dates 2-3 months out (vs. a month or less) leave more time for cases when the breakout (or bottom/momentum) trade takes longer to develop, or fails and then makes a comeback (breakout pullback long).
- With options, you cannot stop out with a large loss. If bad news happens overnight and the stock gaps down on open, in our example the maximum you can lose is $300, but **could be much greater** for a $10k stock position.
- Screen for stocks that can hit the breakout or price target 1 or 2, with good option profits, within the expiration timeframe.
- Options are **expensive when bought near upcoming news, and earnings** resulting in low profit at target and a low profit/loss ratio.
- Stay away from low volume stocks with wide option buy(ask)/sell(bid) spreads (these will have low option volume). Buying an option at the ask, you immediately lose 30% selling at the bid. Larger stocks and ETF/indexes have better pricing on options with higher option volume and narrower spreads.
- The same profit/loss principles (minimum 3:1 profit/loss) for stocks should be applied to options.

Stops/Trailing Stops

o   The best stop price is one that is just below support, if hit invalidates the trade.

o   To tweak/adjust the stop use the 5 (or 10) day intraday chart to see the short term intraday support area. In the above 10 day chart (continuation breakout watch) the 25.5-25.6 area would be considered support area, with stop at 24.4 or lower.
o   Trailing stop price should only move higher.
o   The Consultant tool will initially keep stops wider and then start to tighten them as the stock rallies. After a good rally, a stock may form a narrow resistance area, which allows a tight stop to be placed just below it.
o   Tighten stops once a day in the morning unless it is a very active stock that has a large move during the day.

Stocks To Watch and StockWatch
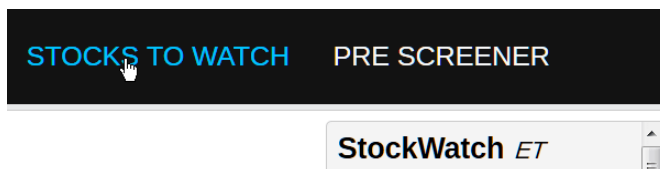
o   **Stocks To Watch** is a daily list of screened stocks for breakout, momentum and bottom setups.
o   **StockWatch** is a subset of the daily Stocks To Watch that show the most promise to make a move higher.
o   After the market opens, StockWatch updates may also include newly screened stocks.

Indicators

Scale +/- 0 (min) to 10 (max)

QUOTE

103.42, **+0.21** pts (**+0.2%**), Friday 17 Aug 2018, close

■ 1

flat from yesterday's close.

Today's: L:102.35 O:102.8 H:103.88

Typical price range: **100.2** to **106.2** : ± 3 pts, ± 2.9%

Extreme price range (85% of time) **97.21** to **109.2** : ± 6 pts, ± 5.8%

VOLUME

310.5k shares, **-53.8%** compared to typical daily volume over the past 6 months.

Typical daily volume is **671.5k** shares over the past 6 months.

RALLIES/PULLBACKS ** Current price area

Typical: **18.89** pts (18.3%) occurs 25% of the time.

Extreme: **24.56** pts (23.7%) occurs 5% of the time.

- Today's typical and extreme price range (holds 85% of the time) is useful for deciding when an intraday price move has been excessive and a possible top or bottom area for the day.

- Volume
    o The number of shares traded in a trading session compared to what is expected at that time of day (end of day daily volume is compared to the past 6 months).
    o Typical daily volume can be found on the 8 month chart.
    o Typical volume uses a proprietary algorithm to calculate and remove high and low volume days that may skew the reading.
    o Strong volume early in the trading session may help confirm breakouts or buying at support areas.

- Typical and extreme rallies (in stock points/%) are from support at the current price for momentum trades.

1 DAY PRICE CHANGE

■ 1

flat (+0.21 pts, +0.2%) from yesterday's close.

SHORT TERM DIRECTION

■■■ -6

pullback.

OVERBOUGHT/SOLD

■■ 4

NeutralPlus, odds slightly favor short trades.

1 MONTH TREND

■■■ 7

Strong Up trend, may start to turn sideways.

INTERMEDIATE TREND ** Past 4 months

■■■ -10

bearish, Unsustainable uptrend, may turn sideways.

- 1 day price change
    - Helps prevent chasing a stock upward on the day you may want to add a long position.
    - For intraday traders, a -9 or -10 reading is an extreme. A 1 day price change and possible long opportunity (+9,+10 for possible short opportunity).
    - Use Screener to screen for intraday extreme 1 day price changes.

- Short term direction
    - Rallies/Pullback that occur over 1-3 weeks.
    - Extreme rally (9-10) may be used to take profits on a long position.
    - Indicates pullbacks for entries on momentum (with trend) long trades.
    - Avoids entering a breakout after a strong/excessive rally (8+).

- Overbought/sold
    - Medium term indicator, which captures a 1-3 month long stock uptrend and signals whether it is overbought.
    - Cautions on entering a breakout when overbought.

- 1 Month Trend
    - How fast the stock price has rallied over the past month (slope).
    - Extreme month trend 9 or 10 rarely continues for another month.
    - Flat month trends can be used for determining stock tops and bottoms.
    - Bottom breakouts have a higher probability after a flat month trend.

- Intermediate Trend
  - Longer term indicator, which looks at the 4 month stock trend.
  - Uptrend for entries on momentum (with trend) long trades.
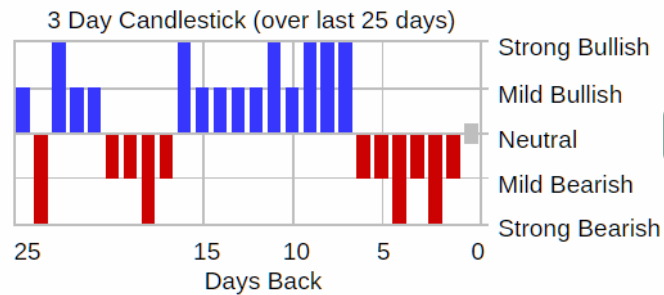 - Screens for the start of an intermediate trend higher

3 DAY CANDLESTICK

▌0

Neutral 3 day candlestick pattern.

████ 4

Mild 3 day accumulation

3 Day Candlestick (over last 25 days)

Strong Bullish

Mild Bullish

Neutral

Mild Bearish

Strong Bearish

25   15   10   5   0

Days Back

2 Day Avg

MONEYFLOW

■ 1

Not significant Neutral 1 day moneyflow,

- 3 Day Candlestick
  - Analyzes the past 3 day candlestick chart, using over 120 candlestick patterns.
  - Patterns ranked as neutral (0), mild bullish (+5) and bearish (-5), strong bullish (10) and bearish (-10)

Neutral 0   32   Mild bullish +5   34.2   Strong bullish +10   25.2 / 24.5
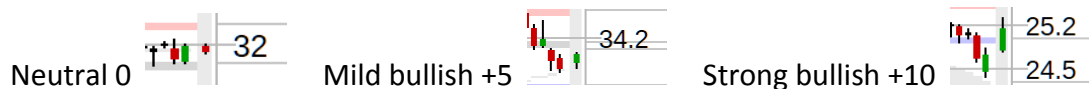
  - Strong accumulation enhances the credibility of the 3 day candlestick pattern.
  - Strong accumulation at the start of a breakout helps in the odds of follow through.
  - Extreme Accumulation 9 or 10 may mark a stock bottom.

- MoneyFlow (1 day)
  - Very short term indicator measuring the 1 day money flow compared to previous days.
  - Extreme 1 day money flow, 9 or 10 may mark the end of a rally or pullback.

Screener

Get/Set Screen String

Screen String: Get Set

- Screen String link allows one to get and set screener strings in the format below:

  #0,345,00!0!!0!,124789abd,0, 12,,12,,24, 000000000000,234,,2345,000008#

- To set a screen string, click on the "Set" link, then copy and paste the complete string (including the #'s) into the pop up box.
- To get a screen string, click on the "Get" link, then copy the complete string (including the #'s) shown in the pop up box to a text file or share with other members.
- Save/backup extra screens besides the 25 screens allowed under the "**Save Screen** as User Preset" pull down.

Set Up a Basic Breakout Screen

- Make sure to save any previous screens.
- Click on the Screener "Reset Screen" link to clear the current screen.
- Set up a basic breakout screen with the following parameters:
  - Stock price: 5 and greater
  - Typical volume: 300K and greater daily typical volume
  - 1 day change: flat, up
  - Short term direction: flat,up
  - Overbought/sold: all values except Overbought, Extreme Overbought
  - 1 month trend: flat,up
  - Intermediate trend: all trends except Unsustainable uptrend
  - Breakout: watch, confirmed
  - Breakout profit: 5% and greater
  - Sort by: Breakout Profit, highest profit listed first

- The screen string for this breakout screen is listed, below, to set, copy and paste the string (including the #') into the Screen String "Set" link pop up box.

  #,23456,,345,00!0!!0!, 124789abcd,,1234579,,12, ,12,,12,000000000000, 24,,2345,000008#

- Screener with breakout screen

Select User Preset	0: User Preset List ▼		**Screen String:** Get Set		**Reset Screen**

Or PreScreen: General Screens ▼ **Info**

Or high quality: [Long] [Breakout] [Short] [Breakdown] screen.

Save Screen as User Preset: 0: None_____ ▼

OVERALL Price: 5 selected ▼ Typ Volume: 300K-600K, 600K-1M, > 1Mil ▼ Overall: ALL ▼

Typical Rallies/Pullbacks: ALL ▼ ⓘ *To screen out lightly traded stocks select a range for Price and Volume*

POSITIONING 1 Day Change: Flat, Up ▼ Short Term Direction: Flat, Up ▼

Overbought/sold: 7 selected ▼ 1 Month Trend: Sideways/flat, Up ▼

Intermediate Trend: 10 selected ▼

Support/res: ALL ▼ Sup/res Type: ALL ▼

Sup/res Strength: ALL ▼

TIMING 3 Day Candlestick: ALL ▼ 3 Day Accum/Distr: ALL ▼ Accum/Distr Strength: ALL ▼

1 Day Money Flow: ALL ▼ Money Flow Strength: ALL ▼

LONG TRADE Target 1 Profit: ALL ▼ Profit/Loss: ALL ▼ Target 1 Potential: ALL ▼

Breakout: Watch, Confirmed ▼ Breakout Profit: 5-9%, 9-16%, 16-25%, > 25% ▼

SHORT TRADE Target 1 Profit: ALL ▼ Profit/Loss: ALL ▼ Target 1 Potential: ALL ▼

Breakdown: ALL ▼ Breakdown Profit: ALL ▼

Sort by: 8: Breakout Profit ▼ Options: ALL ▼ Use List: ALL Stocks ▼ **SearchTool Help**

Results Current ▼ | **Screen!** | Output Style: 2: Fixed Breakout ▼ | **Edit** | Custom search

- Click the "Screen!" button to execute the breakout screen.
- To save this screen, select one of the 25 open slots available under the "**Save Screen** as User Preset" pull down.

Set Up a Basic Momentum (with Trend) Long Screen

- Make sure to save any previous screens.
- Click on the Screener "Reset Screen" link to clear the screener.
- Set up a basic long screen with the following parameters:
  - Stock price: 5 and greater
  - Typical volume: 300K and greater daily typical volume
  - 1 day change: flat, up
  - Overbought/sold: all values except Overbought, Extreme Overbought
  - 1 month trend: up

- o Intermediate trend: Uptrend turned sideways, Uptrend with recent pullback, Mild uptrend, Uptrend
- o Support/res: at support
- o Target 1 profit: 5% and greater
- o Profit/Loss: 2.5:1 and greater
- o Target 1 Potential: good, excellent
- o Sort by: Long Target 1 Profit, highest profit listed first

- The screener string for this long screen is listed below, to set, copy and paste the string (including the #'s) into the Screen String "Set" link pop up box.

  #,23456,,345,00!0!!0!, 479b,,1234579,20,12, 100000000,2345,,34,, 456,00000004#

- Screener with long screen

Select User Preset	0: User Preset List ▼	**Screen String:** Get Set	**Reset Screen**
Or PreScreen	General Screens ▼	**Info**	
Or high quality	Long Breakout Short Breakdown screen.		
Save Screen as User Preset	0: None_____ ▼		

OVERALL Price [5 selected ▼] Typ Volume [300K-600K, 600K-1M, > 1Mil ▼] Overall [ALL ▼]
Typical Rallies/Pullbacks [ALL ▼] ⓘ *To screen out lightly traded stocks select a range for Price and Volume*

POSITIONING 1 Day Change [Flat, Up ▼] Short Term Direction [ALL ▼]
Overbought/sold [7 selected ▼] 1 Month Trend [Up ▼]
Intermediate Trend [4 selected ▼]
Support/res [At support ▼] Sup/res Type [ALL ▼]
Sup/res Strength [ALL ▼]

TIMING 3 Day Candlestick [ALL ▼] 3 Day Accum/Distr [ALL ▼] Accum/Distr Strength [ALL ▼]
1 Day Money Flow [ALL ▼] Money Flow Strength [ALL ▼]

LONG TRADE Target 1 Profit [4 selected ▼] Profit/Loss [3 selected ▼] Target 1 Potential [2 selected ▼]
Breakout [ALL ▼] Breakout Profit [ALL ▼]

SHORT TRADE Target 1 Profit [ALL ▼] Profit/Loss [ALL ▼] Target 1 Potential [ALL ▼]
Breakdown [ALL ▼] Breakdown Profit [ALL ▼]

Sort by [4: Long Target 1 Profit ▼] Options [ALL ▼] Use List [ALL Stocks ▼] **SearchTool Help**

Results [Current ▼] **Screen!** Output Style [2: Fixed Breakout ▼] **Edit** Custom search

- Click the "Screen!" button to execute the long screen.
- To save this screen select one of the 25 open slots available under the "**Save Screen** as User Preset" pull down.

Screen For Intraday Moves

- Convert breakout or long screens to find strong intraday moves, make the change below:

1 Day Change	Flat, Up, Strong Up ▼		Up, Strong Up ▼
	☐ ALL		☐ ALL
	☑ Flat		☐ Flat
	☑ Up	→	☑ Up
	☐ Down		☐ Down
	☑ Strong Up		☑ Strong Up
	☐ Strong Down		☐ Strong Down
	☐ Excessive Up		☐ Excessive Up
	☐ Excessive Down		☐ Excessive Down

Profit Expectations on Screens

OVERALL Price `25-40, 40-70, > 70 ▼` Typ Volume `300K-600K, 600K-1M, > 1Mil ▼`

Typical Rallies/Pullbacks `ALL ▼` ⓘ *To screen out lightly traded stocks select a range for Pri*

- When setting the screener Price and Typ Volume range see below for the profit expectations on large cap (price 25+, volume > 1Mil), mid cap (price 12+, volume 300k-1Mil) and small cap (price <12, at any volume) stocks. Notice certain industry/sectors show up more frequently for each size/profit. You may want to make separate screens for each type.

Small Cap/Biotech
$ACAD $CYTX $KERX
Target: 15%+

Mid Cap
$BCOR $DPLO $SINA
Target: 7-15%

Large Cap/Financial
$AAPL $BAC $FB
Target: 3-6%
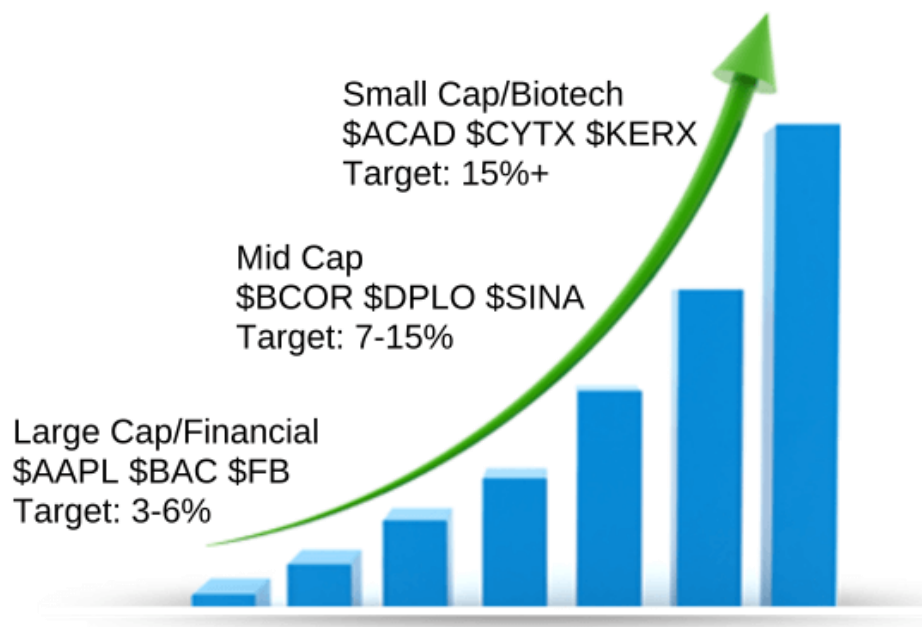
Preset High Quality Screens

Screener ❓ Screener Help

[Current ▼] **Screen!**

| Select User Preset | 0: User Preset List ▼ | **Screen String:** Get Set |

Or PreScreen General Screens

Or high quality [Long] [Breakout] [Short] [Breakdown] screen.

- Use Screener buttons (above) to screen for high quality Long, Breakout, Short and Breakdown trades.

Market	Pullback	Rally	Extended Rally
# Long results	High	Low	Low
# Breakout results	Low	High	High (overbought)

Custom Screens Using Screen String

SCREENER   PORTFOLIO   STOCKS TO WATCH

Wednesday 16 Aug 20

[Current ▼] **Screen!**

eset List ▼   **Screen String:** Get Set

s ▼   Info

out [Short] [Breakdown] screen.

- To set a screen string, click on the "Set" link, then copy and paste the complete string (including the #'s) into the pop up box.
- A good general breakout screen for momentum and bottoming stocks:

  #0,345,00!0!!0!,124789abd,0,12,,12,,24,000000000000,234,,2345,000008#

- Adding high volume to the above good general breakout screen and increasing the range of volume to 100k+ daily:

  #0,2345,00!0!!0!,124789abd,0,12,,12,,24,0000002,45,0000,234,,2345,000008#

- A member requested a high volume stock screen. Use the Screener **1 Day Money Flow** (bullish) and **Money Flow Strength** (strong/extreme) to find stocks with high volume. Set the **1 Day Change** to control how big a move occurs on that volume, from flat with high volume to strong up/extreme up with high volume.

TIMING 3 Day Candlestick [ALL ▼]   3 Day Accum/Distr [ALL]

1 Day Money Flow [Bullish ▼]   Money Flow Strength [Strong, Extreme ▼]

  #,23456,,345,00!0!!0!000020000002,5,000000000004#

- To find the latest requested and custom screens search Twitter for **#scscreens** (click on link)

Portfolio and Screener List Options

Results Current ▼ Output Style	**Results** Current ▼ **Screen!**
Portfolio list options ⚙ Chart Options	Screener list options ⚙ Chart Options

- Click on the links above for the pop ups below

Portfolio List Options

Show [35] stocks per page. (35 Max) *slow computers make take longer on 35 charts*

◉ Charts & Data ○ Data only

☑ Rally Bands/MA

[SET] [CANCEL]

Screener, PreScreener, Stocks To Watch List Options

Show [20] stocks per page. (35 Max) *slow computers make take longer on 35 charts*

◉ Charts & Data ○ Data only

☑ Rally Bands/MA

[SET] [CANCEL]

Notes:

- Page speed will depend on computer speed, browser (Chrome, Firefox, IE), number of stocks displayed, and/or rally bands "Always on".

- Screener and Portfolio list options are independent. You may want less chart detail on Screener and more detail when viewing portfolio and whole sectors/index lists.

- Portfolio and Screener List options:
    - Change the **number of stocks displayed per results page** from 1 to 35 charts/data (some mobile, tablet and older IE browsers may be sluggish with more than 10-20 charts).
    - Choose between both charts and data, or data only output.
    - Turn on/off Rally Bands/MA (moving average) indicators to increase speed on Internet Explorer browsers.
    - Portfolio and Screener list options are independent, you may want different output indicators for each tool.

Portfolio and Screener Output Styles
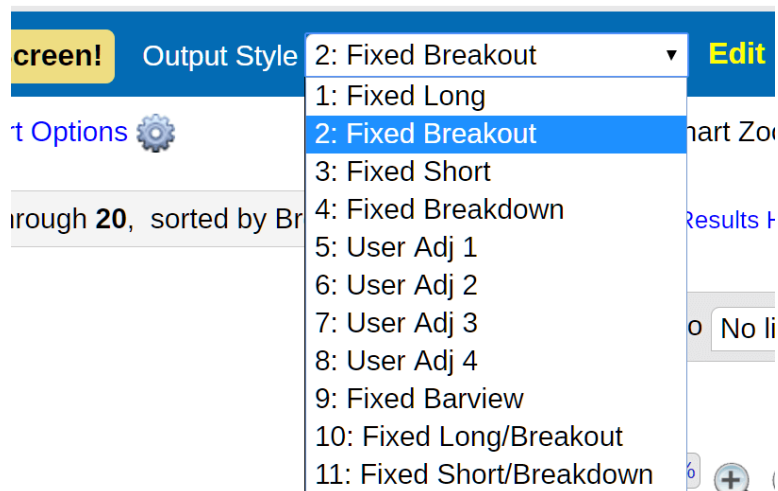
- The "Output Style" pull down sets what indicators will be shown in the table results for each stock. For example, the "Fixed Breakout" output style is listed below.

Symbol	Price & Volume	1d Change	1d Moneyflow	3day Chart	3d Acc/Dist	ST Direction	Breakout
1. **INTU** - 11:55 am ET Tuesday 3 Jan 2017	114.88,+0.27 pts (+0.2%) 561.3k (+7.7%)	+2 flat	+7 Strong bullish	+5 Mild bullish	+4 Mild accum	-6 pullback	None.

T1 up	Stop Up	P/L Up	Overbought/sold	Month Trend	Intermediate Trend	Support/Resistance
121.25 +5.5%	113.49 -1.2%	4.6 : 1 **Excellent**	-1 Neutral	+2 Mild Up	Uptrend.	at support **115.6** ± 1.04, type **triple**, 10

- Selecting one of the User Adj 1-4 styles and clicking on "Edit" allows one to change the name and output indicators listed in the table.
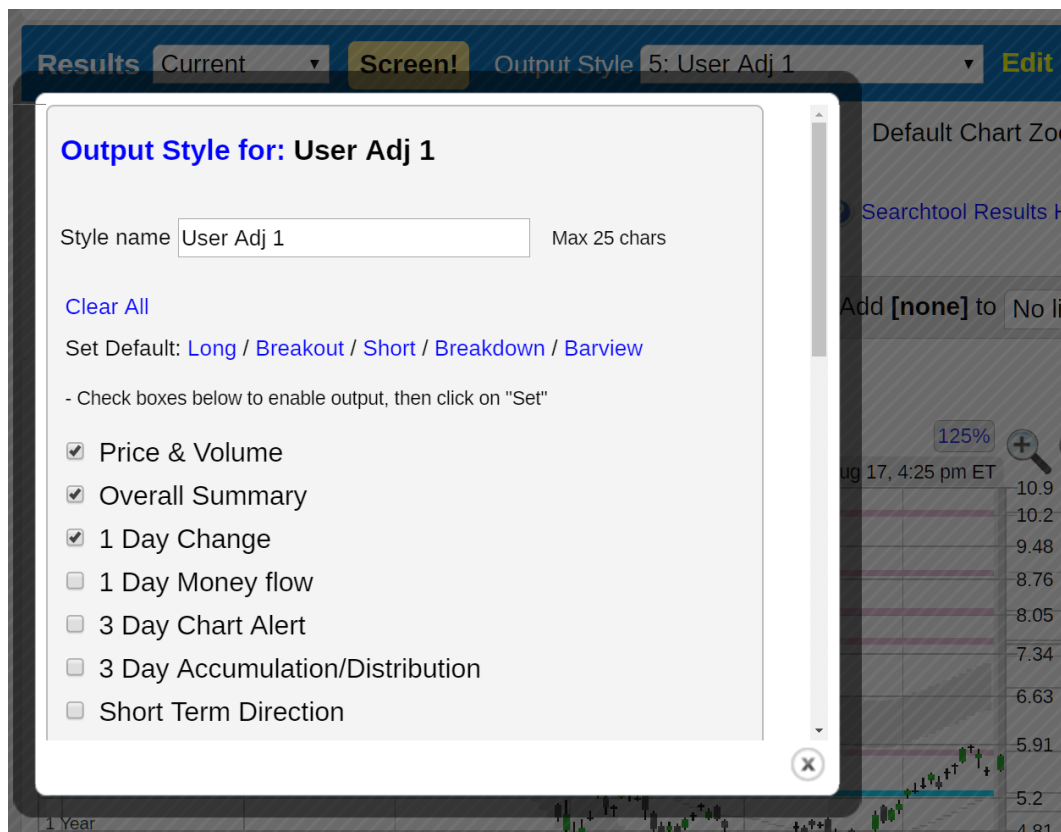
- For preset screens, the output styles will default to one of the fixed styles (Long, Breakout, Short, Breakdown).
- There are four user adjustable output styles(5-9). The names and indicators can be changed and will be saved and used with the current portfolio or screen.

Chart Options
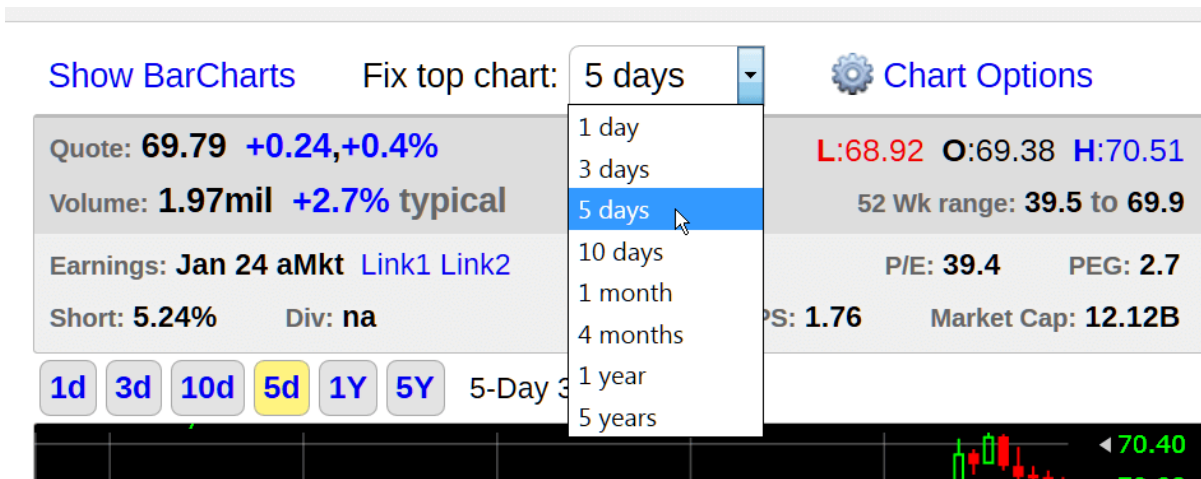
- Consultant Tool options, top right of results page
  - o Show BarCharts/CandleCharts link.
  - o Fix top chart: select time frame from 1-10 days(intraday) or 1 month to 5 years.
  - o Chart Options link:
    - ▪ Chart type Bar or Candlestick
    - ▪ Linear or log charts
    - ▪ Display resistance/support lines
    - ▪ Add Moving Avg(average) 1 and Moving Avg 2 lines
    - ▪ Program time frames for the top and detailed chart overlay charts.
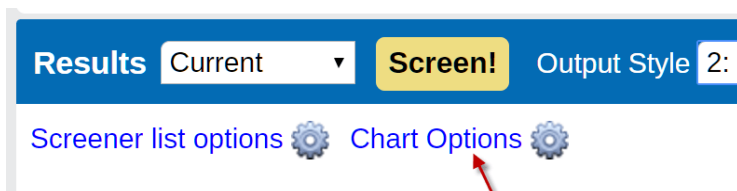
- Chart Options links are also listed under Detailed Chart, Portfolio and Screener.

8 Month Chart Overlay
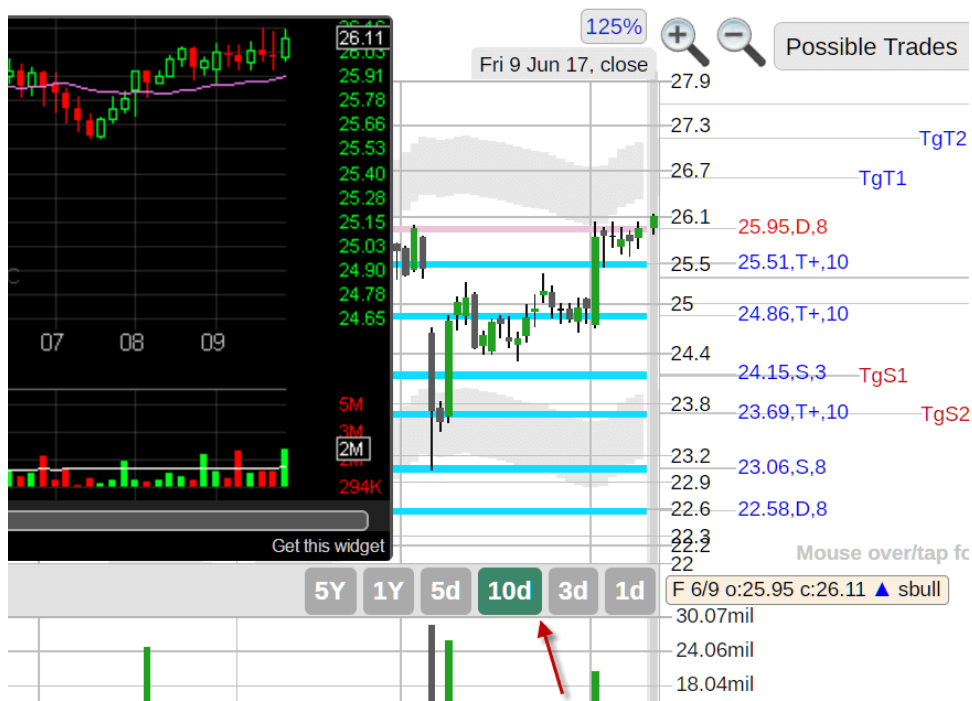
- To display a real time chart overlay, click or mouse over the icon corresponding to a 1 day through 10 day intraday chart or 1 through 5 year chart.
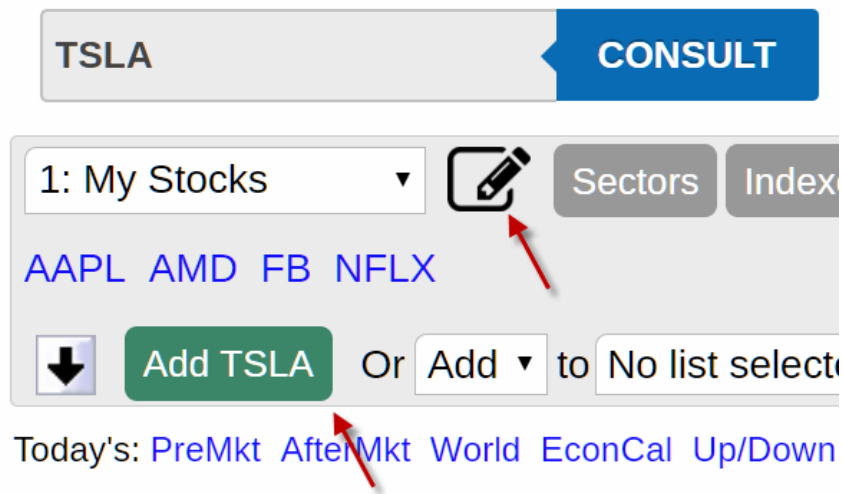
8 Month Chart RallyBands

- RallyBands are shaded areas on the chart where a stock may rally (or pullback) to and then reverse or consolidate.

Adding Stocks

- Add stocks by selecting a list from the pulldown and clicking on the edit icon. Add a single stock by clicking on the Add button. Other options allow one to add or move a stock to another list.

- Change a stock list name, add or copy comma or space delimited stock symbols (up to 70 per list) and sort.