

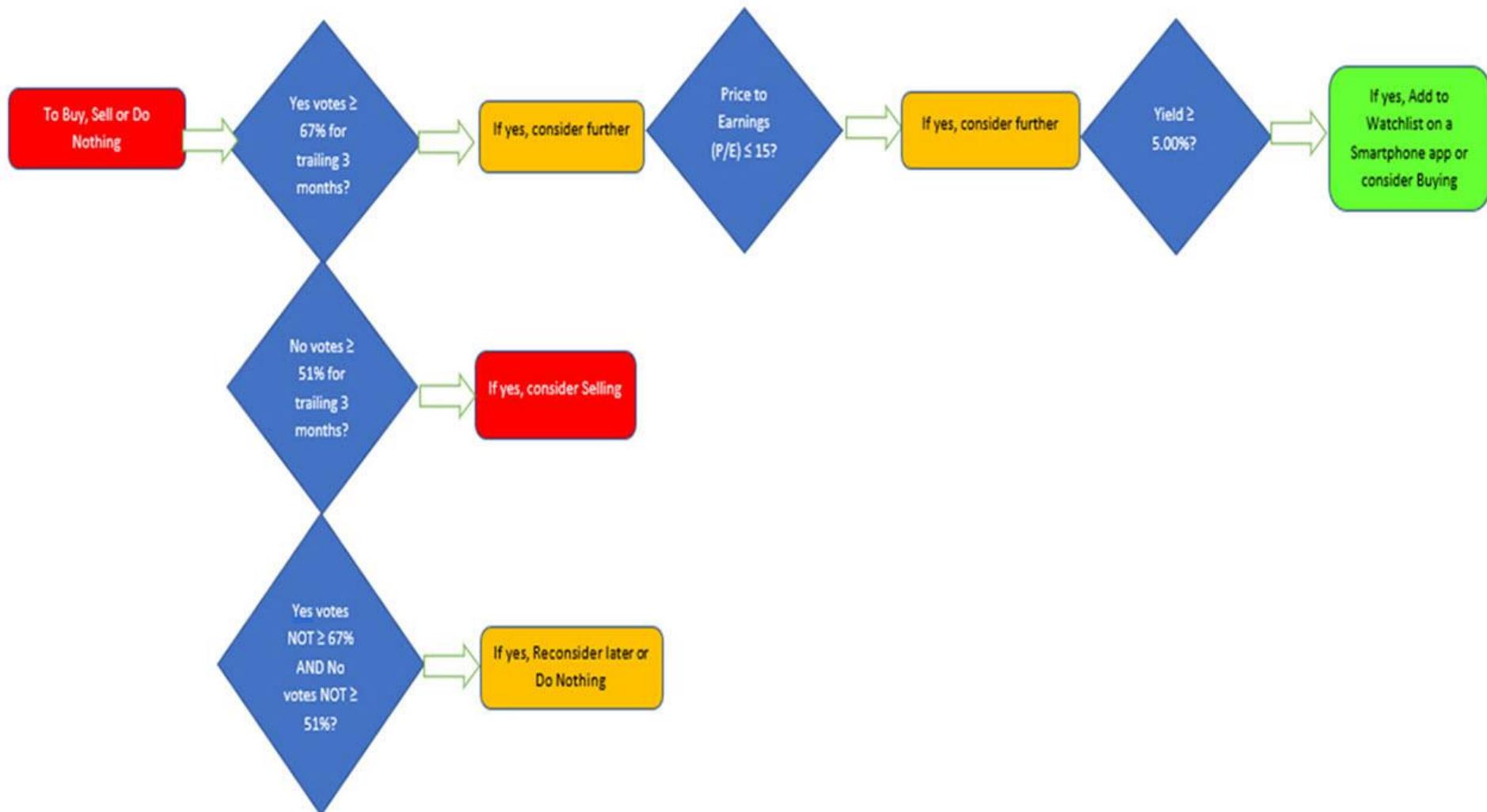
## Table of Contents

PART 1 FLOWCHART HOW TO DECIDE TO BUY OR SELL OR DO NOTHING .....	4
PART 2 BUSINESS CASE 5 REASONS TO USE RSTUDIO & EXCEL TO BUY & SELL SHARES (ADAPTED FROM HARVARD BUSINESS REVIEW MINI GUIDE: BUILDING YOUR BUSINESS CASE) .....	5
1. CLARIFY THE NEED.....	5
2. CONSIDER ALTERNATIVES.....	7
3. THINK THROUGH THE "HOW" AT A HIGH LEVEL.....	8
4. ESTIMATE THE COSTS AND BENEFITS.....	9
5. CALCULATE RETURN ON INVESTMENT (ROI).....	10
PART 3 SETUP HARDWARE & SOFTWARE ENVIRONMENT .....	11
HARDWARE.....	11
SOFTWARE.....	11
INSTALL SOFTWARE & GET FILES TO SET UP GENERAL ENVIRONMENT .....	11
PART 4 STEPS TO CREATE SPECIFIC EXCEL DATA OR INFO .....	12
STEP 1 IN FILE R1.....	12
STEP 2 IN FILE R2.....	14
STEP 3 IN FILE R3.....	16
STEP 4 IN FILE R1.....	18
STEP 5 IN FILE R2.....	22
STEP 6 IN FILE E1.....	28
STEP 7 IN FILE E2.....	36
PART 5 NOTES AND FURTHER ACTIONS .....	40
PART 6 CASE STUDY ON DTL A WALK IN PARK VIEW FOR MS EXCEL FILES & A MS ACCESS FILE.....	44
LINKAGES OR NOTES TAB VIEW.....	44
VOTES % COMPARE TAB VIEW .....	46
VOTES % COMPARISON FILE VIEW .....	48

MS ACCESS CANDIDATE ANALYSIS VIEW (AS 1 OF 16 IN LIST OF GICS SOFTWARE & SERVICES) .....	50
PART 7 CASE STUDY MS ACCESS SCREENSHOTS & INFO FOR AN ALPHABETICAL LIST BY GICS OF BIG (250M-1B MARKET CAP IN 2022) AUSTRALIAN-LISTED COMPANIES .....	52
GICS AUTOMOBILES & COMPONENTS.....	52
GICS BANKS.....	54
GICS CAPITAL GOODS.....	56
GICS CLASS PEND .....	58
GICS COMMERCIAL & PROFESSIONAL SERVICES .....	58
GICS CONSUMER DURABLES & APPAREL.....	60
GICS CONSUMER SERVICES .....	62
GICS DIVERSIFIED FINANCIALS.....	64
GICS ENERGY.....	66
GICS FOOD & STAPLES RETAILING .....	68
GICS FOOD, BEVERAGE & TOBACCO .....	68
GICS HEALTH CARE EQUIPMENT & SERVICES.....	70
GICS HOUSEHOLD & PERSONAL PRODUCTS.....	72
GICS INSURANCE.....	72
GICS MATERIALS .....	74
GICS MEDIA & ENTERTAINMENT .....	76
GICS NOT APPLIC.....	78
GICS PHARMACEUTICALS, BIOTECHNOLOGY & LIFE SCIENCES .....	80
GICS REAL ESTATE .....	82
GICS RETAILING.....	84
GICS SEMICONDUCTORS & SEMICONDUCTOR EQUIPMENT.....	86
GICS SOFTWARE & SERVICES.....	88
GICS TECHNOLOGY HARDWARE & EQUIPMENT.....	90
GICS TELECOMMUNICATION SERVICES.....	92
GICS TRANSPORTATION .....	94

GICS UTILITIES.....	96
PART 8 GLOSSARY (15 VOTES TOOLS & 2 BRIEF FUNDAMENTALS).....	96
15 VOTES TOOLS (SOURCE INVESTOPEDIA) .....	96
2 BRIEF FUNDAMENTALS (SOURCE YAHOO FINANCE).....	98

# PART 1 FLOWCHART HOW TO DECIDE TO BUY OR SELL OR DO NOTHING



# PART 2 BUSINESS CASE 5 REASONS TO USE RSTUDIO & EXCEL TO BUY & SELL SHARES (ADAPTED FROM HARVARD BUSINESS REVIEW MINI GUIDE: BUILDING YOUR BUSINESS CASE)

## 1. CLARIFY THE NEED

1. CLARIFY THE NEED: Isn't it painful to buy or sell shares or assets at the wrong time? Wouldn't it be beneficial to have a tool to guide you to time the market more effectively? Why do DIY investors make bad timing decisions? Part of the reason lies in paying too much attention to news. Yet, history shows too many of us continue to rely on NEWS announcements as a primary source of DECISION input. To see the evidence, one needs only to COMPARE sudden or significant changes in price with the news of the day.

As an ALTERNATIVE, the DIY investor has the option to step back from news and noise. The DIY investor can and should use a variety of decision inputs. Here, a suggestion is to measure “crowd” or market participant “signals”. It is possible to find crowd signals through SIMPLE “percentages”, discipline and systems thinking.

The author will walk you through and to a system, one pointing to simple percentages. As an overview, the system is divided into 3 segments. Each based on intervals of increasing duration, 3 months, 9 months, and 3 years. In each period more evidence is gathered, in the form of “Votes”.

For example, in the trailing 3 months for share ABC, crowd or market participants could have SOLD OFF an unusually large quantity. As a RESULT, the Votes system may well produce a significant majority of yes or buy Votes---say---75% or more, in comparison to---say---25% or less, no or sell Votes. Absorbing these NUMBERS, you will have stepped back, noticing crowd behaviour. To build a POSITION, the DIY investor also wants to consider, at a minimum, brief FUNDAMENTALS. Namely, price-to-earnings ratio (P/E) and yield. More on that later.

TIME is of the essence. Learning the system requires PATIENCE. Setting up free software (RStudio). And getting acquainted with Excel (essential), Access (optional). More on that later.

Where will the solution be used? How should you measure the solution's effectiveness? Do we have a baseline that we can compare against?

Where will the solution be used? The DIY investor can use it on a weekly or monthly basis or both. For example, the author used the system to buy and sell BHP.AX (see Yahoo codes). Where over about 6 months, the author made not less than 10% in profit. Bought at about \$40 per share. Selling at around \$45.

How should you MEASURE the solution's effectiveness? The DIY investor can measure effectiveness in terms of time spent and profits earned.

Do we have a BASELINE that we can compare against? Yes. One suggestion is to compare returns to the MARKET. Compare apples with apples. That is, check returns against the SAME PERIOD. If, for example, the market had returned 5%, just by buying and holding---ask yourself---what the return was against use of the system.

Doesn't this all sound like a lot of unnecessary work? No. The patient OR motivated DIY investor can start with small test(s). B1 is free. It shows you how to get started quickly. At zero to low cost. Specifically, the main cost would be time. Initial learning curve estimate, including set up, 2-3hrs. After which, the DIY investor could be producing Excel spreadsheets---for decision-making purposes---in about an hour.

Are you more a visual or auditory learner? B1 and B2 both contain a detailed visual map of screenshots, plus guiding words. Getting you started. Getting you to the end.

Overall, the Votes system is simple, containing just a few clear and simple steps. Patience is key because the DIY investor will still need to know what to do if problems arise. If you want to get the best out of the Votes system, please retain a good audit record as to your files and actions. That way, you, or the author or both can pinpoint and solve any issue(s).

## 2. CONSIDER ALTERNATIVES

What have other solutions or software done? What's worked, and what hasn't?

What have other solutions or software done? The DIY investor might have or be considering other systems or software. Ask: what are the pros and cons of each? Decision criteria or CONSTRAINTS for you, the DIY investor, might include TIME or MONEY or both.

What's worked, and what hasn't? The Votes system is a mix of software computations (via RStudio) and Excel templates. Requiring a little MANUAL labour. Other software solutions, for example, are or would be MORE AUTOMATED. Potentially saving you time. The Votes system is low or no cost. Potentially cheaper than other solutions.

The Votes system also offers an exciting or interesting mechanism to see the "shape" of CROWD BEHAVIOUR. That is, when you manually highlight and run the code in RStudio, the Plots section shows PRICE CHARTS, indicating crowd or price pattern results. It's like an ANIMATION or MOVIE from the past. A more automated solution may not do that.

The author feels COMFORTABLE using the Votes system. It takes him about an 1hr---and not more than 2hrs---to REVIEW holding(s) or check for OPPORTUNITIES. Outside of the basic Votes system, it isn't a bad idea to develop a database of past price behaviour. The idea is to increase knowledge or big picture perspective about markets or economics.

To that end, the author has been using MS Access. You can see screenshots of Access output in both B1 (free) and B2.

What about doing nothing? Not adopting a new system. DOING NOTHING is often viable. The reason could be due to cost to benefit analyses not showing a great upside.

Alternatively, how does doing nothing fit in with the Votes system? The AUTHOR DOES NOTHING IF the Votes system doesn't show a significant percentage for or against buying or selling. In the case of BHP.AX---FOR EXAMPLE---one of the REVIEWS showed 63% yes or buy Votes. At that stage, the AUTHOR DID NOTHING. In general, a score of 67% or greater of yes or buy Votes would have been needed to act, if at all. The simplicity of a SINGLE PERCENTAGE can and has worked for the author (76% yes or buy Votes...). It could for you.

A few questions to consider. Which option costs the least? Which is the fastest to implement? Which has the fewest risks? Which brings in the most revenue? As a DIY investor, thinking through what it would mean to implement a system is what counts.

### 3. THINK THROUGH THE “HOW” AT A HIGH LEVEL

To implement and benefit from the Votes system, you will need to be mindful of time and cost. As to initial time investment, the author estimates 2-3hrs. That is, downloading RStudio, forking 5 files from GitHub and working through B1 or B2 Quick Start Guide. In terms of cost, you will need access to Excel (essential).

If you don't like the Votes system, you can uninstall RStudio. Estimate of clean up time: less than 30min.

Often, your broker account will have profit and loss info available. It's a good idea to have a system in place.

## 4. ESTIMATE THE COSTS AND BENEFITS

You might want to compare alternatives in connection to cost versus benefit analysis. You can try estimating time and costs. If you use an off-the-shelf software package, you will have obtained considerable automation as to decision points. If you go with the Votes system, after initial setup, you will be investing about an hour periodically. If you were reviewing existing holdings, for example, you might use the Votes system monthly.

The RStudio computations are at the centre of the Votes system. The software is free. If it remains free, the main consideration is time investment.

In accounting for transactions, accountants initially categorise inflows and outgoings via revenues and expenses. These form your Profit & Loss (P&L) statements. The Votes system does not incorporate P&L templates. However, the info in broker accounts is a great place to start. You will want to have a good audit trail or accounting system.

In terms of accounting for time, you might want to put a cost on the hour. For example, if you spend 1hr per month reviewing a holding, the time cost might show as \$100. If you did that 10 or 15 time in a year, the cost would show up at not more than \$1,500.

Revenue is magnified or diminished in connection with budget, or amounts invested. Using the Votes system is about improving market TIMING. The author produced about \$3,500 in revenue after selling BHP.AX (Yahoo code), and approximately \$3,000 in expenses. Not including learning curve costs as to developing the Votes system. The two transactions, buying and selling BHP.AX, transpired over less than 6 months.

It's a good idea to be conservative in generating profit estimates. Accountants do that by incorporating Cost of Goods Sold (COGS), the second line after Revenues. As to buying and selling shares, key GOGS elements might include Cost of shares, cost of brokerage, and time spent analysing. Subtract GOGS from Revenues to get Gross Profit Margin (or loss). As a DIY investor, finding the bottom-line profit should just involve one more key item; namely, tax, if any.

Money is money. Accounting conventions should help to organise and simplify things.

Some costs or benefits may well be hard to quantify. If you can estimate a number, aim to do so. Say, for use of time. If you can't estimate a number, the item or idea might still be worth consideration, or a mention.

If you need help as to quantifying a number, ask yourself if the input is bias. If bias is a problem, aim to corroborate estimates with a second source. On time, it is imagined, you would be the best at putting a value on that. Estimating \$100 an hour could be a good starting point.

## 5. CALCULATE RETURN ON INVESTMENT (ROI)

### 2. CALCULATE ROI

The classic calculation is  $ROI = \text{Net Benefit} / \text{Total Cost}$ . Goodness of fit depends on a positive number. There are many good templates online.

Four common ways to calculate ROI include:

- Break-even analysis
- Payback period
- Net present value
- Internal rate of return

For the purposes of adopting the Votes system, the Payback period might be the best. Say, for example, you cost your time at \$100 an hour. And let's say, for example, it takes you 10 to 15hrs to become proficient. To be conservative, let's assume 15hrs or \$1,500. Also assume the time investment is spread over 1 year. If the Votes system is a fit, you could recoup the \$1,500 in less than a year. How? By making significantly better timing decisions. On the other hand, the 15hrs or \$1,500 could be written off as a sunk cost.

# PART 3 SETUP HARDWARE & SOFTWARE ENVIRONMENT

## HARDWARE

- PC or Mac
- Smartphone such as an iPhone

## SOFTWARE

- RStudio IDE including R language (for use with computer)
- MS Excel or other Spreadsheet app (for use with computer or smartphone or both)
- MS Access (Optional: for use on computer)

## INSTALL SOFTWARE & GET FILES TO SET UP GENERAL ENVIRONMENT

- Install RStudio & R language <https://posit.co/download/rs>
- Fork 3 R files (r1, r2, r3) from GitHub and 1 Excel file (e1) <https://github.com/cracked-crystalball-99/rstudio-files-and-excel-files>
- Open RStudio and 3 R files (r1, r2, r3)

# PART 4 STEPS TO CREATE SPECIFIC EXCEL DATA OR INFO

## STEP 1 IN FILE R1

- a) highlight code lines 2, 3, 4, 6
- b) execute one-by-one (Run button)
- c) CHECK correct libraries have been loaded



RStudio

File Edit Code View Plots Session Build Debug Profile Tools Help

Go to file/function Addins

Stock-Technical-Analysis-with-R.R 15-Voting-Tools-for-Ugly-or-Underserv... Get-Global-Vars-Codes-Or-Symbols-Ya...

Source on Save



Project: (None)

Environment History Connections Tutorial

Import 21 MB List C

R

Global Environment

Data

360.AX	'xts' num [1:188,...]
3PL.AX	'xts' num [1:64,...]
A4N.AX	'xts' num [1:760,...]
ABA.AX	'xts' num [1:759,...]
ARR.AX	'xts' num [1:558]

Files Plots Packages Help Viewer Presentation

Zoom Export

C

```
7 # 1. Load R packages
8 library("TTR")
9 library("quantmod")
10 library("PerformanceAnalytics")
11
12 library("writexl")
13
14 ## 2. Data Downloading or Reading
15
16 # 2.1. Yahoo Finance
17
```

12:19 # (Untitled) R Script

Console Background Jobs

R 3.6.3 . ~/

Type 'license()' or 'licence()' for distribution details.

R is a collaborative project with many contributors.

Type 'contributors()' for more information and  
'citation()' on how to cite R or R packages in publications.Type 'demo()' for some demos, 'help()' for on-line help, or  
'help.start()' for an HTML browser interface to help.

Type 'q()' to quit R.

[Workspace loaded from ~/.RData]

&gt;



Type here to search



1:15 AM ENG 10/01/2023

## STEP 2 IN FILE R2

- d) Take notice of the division of sections or intention to create 3 Excel or spreadsheet files
- e) For each of the 3 sections determine where to store the files
- f) For each of the 3 sections carefully type 3 different file names and one SINGLE storage path



RStudio

File Edit Code View Plots Session Build Debug Profile Tools Help

Go to file/function Addins

Stock-Technical-Analysis-with-R.R 15-Voting-Tools-for-Ugly-or-Underserv... Get-Global-Vars-Codes-Or-Symbols-Ya...

```
4 ### file creation code, in order: T3M, then T9M, then T3Y ###
5 ### trailing 3 months, trailing 9 months, then trailing 3 years #####
6
7 Ugly_Votes_Updated_T3M = merge(bbposcomp,sarposcomp,adxposcomp,cciposcomp,smacdpo
8 Ugly_Votes_Updated_T9M = merge(bbposcomp,sarposcomp,adxposcomp,cciposcomp,smacdpo
9 Ugly_Votes_Updated_T3Y = merge(bbposcomp,sarposcomp,adxposcomp,cciposcomp,smacdpo
10
11 #VIEW ASSET CLOSING PRICE DATE BEFORE TRANSFERRING TO EXCEL...
12
13 View(Ugly_Votes_Updated_T3M)
14 View(Ugly_Votes_Updated_T9M)
15 View(Ugly_Votes_Updated_T3Y)
16
17 #CREATE EXCEL FILES...(T3M, T9M, T3Y)
18
19 #trailing 3 months
20 write_xlsx(as.data.frame(Ugly_Votes_Updated_T3M),"C:/Users/tony/_icloudDrive/Down
21 )
22
23
```

29:2 (Top Level) R Script

Console Background Jobs

R 3.6.3 . ~/

Type 'license()' or 'licence()' for distribution details.

R is a collaborative project with many contributors.

Type 'contributors()' for more information and



Type here to search



1:23 AM ENG 10/01/2023

Project: (None)

Environment History Connections Tutorial

R Global Environment

Data

360.AX	'xts' num [1:188...
3PL.AX	'xts' num [1:64...
A4N.AX	'xts' num [1:760...
ABA.AX	'xts' num [1:759...
ARR AX	'xts' num [1:558

Files Plots Packages Help Viewer Present

Zoom Export

## STEP 3 IN FILE R3

- g) Set dates to trailing 3 months, preceding the current month
  - i) If current month is May 2023, set trailing 3 months as: Feb to Apr, formatting correctly.
- h) Enter yahoo code(s)
  - i) For example: for BHP enter BHP.AX (as per Yahoo Finance conventions)
  - i) CHECK the details, Yahoo code(s) and dates etc
  - j) RUN the code by highlighting and executing one Yahoo code and date combo at a time
    - i) The idea is to prepare for key or major process, back in file r1---now proceed to Step 4



RStudio

File Edit Code View Plots Session Build Debug Profile Tools Help

Go to file/function Addins

Stock-Technical-Analysis-with-R.R 15-Voting-Tools-for-Ugly-or-Underserv...

Get-Global-Vars-Codes-Or-Symbols-Ya...

Run



Source

Project: (None)

```
1 #T3M OR
2 #T9M OR
3 #T3Y batching up to 60 symbols for gics
4
5
6 getSymbols("BHP.AX",src="yahoo",from="2022-10-01",to="2022-12-31")
7 getSymbols(".AX",src="yahoo",from="2022-10-01",to="2022-12-31")
8 getSymbols(".AX",src="yahoo",from="2022-10-01",to="2022-12-31")
9 getSymbols(".AX",src="yahoo",from="2022-10-01",to="2022-12-31")
10 getSymbols(".AX",src="yahoo",from="2022-10-01",to="2022-12-31")
11
12 getSymbols(".AX",src="yahoo",from="2020-01-01",to="2022-12-31")
13 getSymbols(".AX",src="yahoo",from="2020-01-01",to="2022-12-31")
14 getSymbols(".AX",src="yahoo",from="2020-01-01",to="2022-12-31")
15 getSymbols(".AX",src="yahoo",from="2020-01-01",to="2022-12-31")
16 getSymbols(".AX",src="yahoo",from="2020-01-01",to="2022-12-31")
17
18 getSymbols(".AX",src="yahoo",from="2020-01-01",to="2022-12-31")
19 getSymbols(".AX",src="yahoo",from="2020-01-01",to="2022-12-31")
20 getSymbols(".AX",src="yahoo",from="2020-01-01",to="2022-12-31")
```

6:1 (Top Level) R Script

Console Background Jobs

R 3.6.3 . ~/

Type 'license()' or 'licence()' for distribution details.

R is a collaborative project with many contributors.

Type 'contributors()' for more information and

Environment History Connections Tutorial

59 MB

Global Environment

360.AX	'xts'	num [1:188...]
3PL.AX	'xts'	num [1:64...]
A4N.AX	'xts'	num [1:760...]
ABA.AX	'xts'	num [1:759...]
ARR AX	'xts'	num [1:558]

Files Plots Packages Help Viewer Presentations

Zoom Export



Type here to search



1:27 AM ENG 10/01/2023

## STEP 4 IN FILE R1

- k) Go to file r1 check right panel to SEE global vars or BHP.AX etc (from file r3, step 3 detail)
- l) CHECK global vars are both an 'xts' object and right number of observations (ex 64 or 190 etc)
  - i) If everything is in order proceed to 4) m)

The screenshot shows the RStudio interface. The top menu bar includes File, Edit, Code, View, Plots, Session, Build, Debug, Profile, Tools, and Help. The top toolbar has icons for file operations like Open, Save, and Print, along with Addins. The main window has tabs for 'Stock-Technical-Analysis-with-R.R' and '15-Voting-Tools-for-Ugly-or-Underserv...'. The code editor contains R script code for technical analysis, specifically for Stochastic Momentum Index (SMI) and Williams %R strategies. The environment browser on the right shows a list of global variables, with 'ABB.AX' highlighted. The taskbar at the bottom shows the Windows Start button, a search bar, and pinned application icons for Cloud, Mail, Edge, File Explorer, Task View, Settings, and R.

```
675 # 6.14. Stochastic Momentum Index SMI(13,2,25,9) and Simple Moving Average Crossover and Bands Crossover Confirmation Strategy Returns/Equity  
676 smismastrat <- ret*smismapos  
677 smismastratc <- ifelse((smismatr==1|smismatr== -1)&smismapos!=Lag(smismapos), 1, 0)  
678 # Price Crossover and Bands Crossover Confirmation Strategy Performance  
679 smismacomp <- cbind(smismastrat,smismastratc,bhstrat)  
680 colnames(smismacomp) <- c("SMA(5)", "SMI(13,2,25)", "SMA(5)", "SMI(13,2,25) TC", "BH")  
681 table.AnnualizedReturns(smismacomp)  
682 charts.PerformanceSummary(smismacomp)  
683  
684 # 6.15. Williams %R(14) and Simple Moving Average SMA(5) Strategy Performance  
685 # Price Crossover and Bands Crossover Confirmation Strategy Returns/Equity  
686 wprsmastrat <- ret*wprsmapos  
687 wprsmastratc <- ifelse((wprsmatr==1|wprsmatr== -1)&wprsmapos!=Lag(wprsmapos), 1, 0)  
688 # Price Crossover and Bands Crossover Confirmation Strategy Performance  
689 wprsmacomp <- cbind(wprsmastrat,wprsmastratc,bhstrat)  
690 colnames(wprsmacomp) <- c("SMA(5)", "WPR(14)", "SMA(5)", "WPR(14) TC", "BH")  
691 table.AnnualizedReturns(wprsmacomp)  
692 charts.PerformanceSummary(wprsmacomp)|
```

m) HIGHLIGHT code lines from lines 22 to 664

n) RUN the code!

- o) VIEW the Plots section displaying like a movie to bottom right
    - i) Enjoy learning about “shape” of price or crowd behaviour
- p) ALLOW code to complete
  - i) Idea is to get necessary vars or variables for further processing, as to file r2---now proceed to Step 5



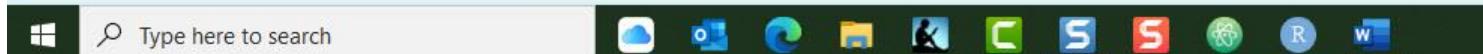
File Edit Code View Plots Session Build Debug Profile Tools Help

Go to file/function Addins

```
671 # 6.14. Stochastic Momentum Index SMI(13,2,25,5) and Simple Moving Average SMA(5)
672 # Price Crossover and Bands Crossover Confirmation Strategy Returns/Equity Curve
673 smismastrat <- ret*smismapos
674 smismastratc <- ifelse((smismastrat==1|smismastrat== -1)&smismapos!=Lag(smismapos),(ret
675 # Price Crossover and Bands Crossover Confirmation Strategy Performance Comparison
676 smismacom <- cbind(smismastrat,smismastratc,bhstrat)
677 colnames(smismacom) <- c("SMA(5),SMI(13,2,25)","SMA(5),SMI(13,2,25) TC","BH")
678 table.AnnualizedReturns(smismacom)
679 charts.PerformanceSummary(smismacom)
680
681 # 6.15. Williams %R(14) and Simple Moving Average SMA(5) Strategy Performance Comparison
682 # Price Crossover and Bands Crossover Confirmation Strategy Returns/Equity Curve
683
684
685
686
687
688
689:38 (Top Level) :
```

Console Background Jobs

```
R 3.6.3 : ~/Desktop
> wprsmastrat <- ifelse((wprsmastrat==1|wprsmastrat== -1)&wprsmapos!=Lag(wprsmapos),(ret
1)*wprsmapos,ret*wprsmapos)
> # Price Crossover and Bands Crossover Confirmation Strategy Performance Comparison
> wprsmacom <- cbind(wprsmastrat,wprsmastratc,bhstrat)
> colnames(wprsmacom) <- c("SMA(5),WPR(14)","SMA(5),WPR(14) TC","BH")
> table.AnnualizedReturns(wprsmacom)
      SMA(5),WPR(14) SMA(5),WPR(14) TC     BH
Annualized Return          0.1403            0.1327 0.2110
Annualized Std Dev          0.3235            0.3235 0.4534
Annualized Sharpe (Rf=0%)   0.4336            0.4102 0.4655
> charts.PerformanceSummary(wprsmacom)
> |
```



1:03 PM  
ENG  
10/01/2023

## STEP 5 IN FILE R2

- q) Note aim is to produce Excel or spreadsheet files for decision-making purposes
- r) If preparing trailing 3 months, highlight and run code lines x, y, then z (ex code lines 4, 10, 17-8)
  - i) Run x, y and z lines---one by one---in that order
  - ii) X merges key or important vars from Step 4
  - iii) Y enables you to VIEW the merge, checking for correct date range
  - iv) Z creates and sends the Excel file or spreadsheet to your DESIGNATED folder

RStudio

File Edit Code View Plots Session Build Debug Profile Tools Help

Go to file/function Addins

Project: (None)

```

3
4 ## file creation code, in order: T3M, then T9M, then T3Y ##
5 ## trailing 3 months, trailing 9 months, then trailing 3 years ##
6
7 Ugly_Votes_Updated_T3M = merge(bbposcomp,sarposcomp,adxposcomp,cciposcomp,
8 Ugly_Votes_Updated_T9M = merge(bbposcomp,sarposcomp,adxposcomp,cciposcomp,
9 Ugly_Votes_Updated_T3Y = merge(bbposcomp,sarposcomp,adxposcomp,cciposcomp,
10
11 #VIEW ASSET CLOSING PRICE DATE BEFORE TRANSFERRING TO EXCEL...
12
13 View(Ugly_Votes_Updated_T3M)
14 View(Ugly_Votes_Updated_T9M)
15 View(Ugly_Votes_Updated_T3Y)
16
17 #CREATE EXCEL FILES...(T3M, T9M, T3Y)
18
19 #trailing 3 months
20 write.xlsx(as.data.frame(Ugly_Votes_Updated_T3M),"C:/Users/tony/OneDrive/Desktop/Stock-Technical-Analysis-with-R.RData")
21
22 (Top Level) R Script

```

Console Background Jobs

```

R 3.6.3 . ~/
> wprsmastrat <- merge(wprsmastrat,wprsmastratc,wprsmapos:=lag(wprsmapos),
  (ret-0.01)*wprsmapos,ret*wprsmapos)
> # Price Crossover and Bands Crossover Confirmation Strategy Performance Comparison
> wprsmacomp <- cbind(wprsmastrat,wprsmastratc,bhstrat)
> colnames(wprsmacomp) <- c("SMA(5)_WPR(14)", "SMA(5)_WPR(14)_TC", "RH")

```

Environment History Connections Tutorial

Import Dataset 97 MB Global Environment

Data

- 360.AX 'xts' num [1:188, 1:6] ...
- 3PL.AX 'xts' num [1:64, 1:6] ...
- A4N.AX 'xts' num [1:760, 1:6] ...
- ABA.AX 'xts' num [1:759, 1:6] ...

Files Plots Packages Help Viewer Presentation

### SMA(5),WPR(14) Performance

Cumulative Return 2020-01-02 / 2022-12-30

Daily Return

Drawdown

Jan 02 2020 Jan 04 2021 Jan 04 2022 Dec 30 2022

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- s) Go to your designated folder and find the Excel file (ex for trailing 3 months)
- t) OPEN that file and delete columns ...
  - i) The idea is to be left with 15 columns A-O, each with “tr” at end of COLUMN NAME



- u) HIGHLIGHT ALL cells, beginning from A1... until you have highlighted all cells with data, 0s and 1s
  - i) Ex for 63 or 64 observations, you will have highlighted cells A1-to-A65-to-O65
- v) COPY those cells (ex ctrl + C on pc)
  - i) Aim to paste data in Excel template e1



## STEP 6 IN FILE E1

- w) PASTE data from Step 5 into appropriate tab of file e1
  - i) SPEND 2-3 minutes CHECKING the structure of file e1
  - ii) AFTER pasting data there, pre-populated Excel formulas do magic

AutoSave (● Off) H ↻ 🔍 A ✓ fx File Home Insert Page Layout Formulas Data Review View Developer Help Comments Share A2

APX.AX-BTH.AX-BVS.AX-DTL.AX-ELO.AX-as-at-31-DEC-2022 Anthony Brticevic AB 🔍

**1** COUNTIF bbtr sartr adxtr ccitr smacdtr cmacdtr roctr rsitr smitr wptr ccismatr rocsmatr rsismatr smismatr wprsmatr Q R S T U

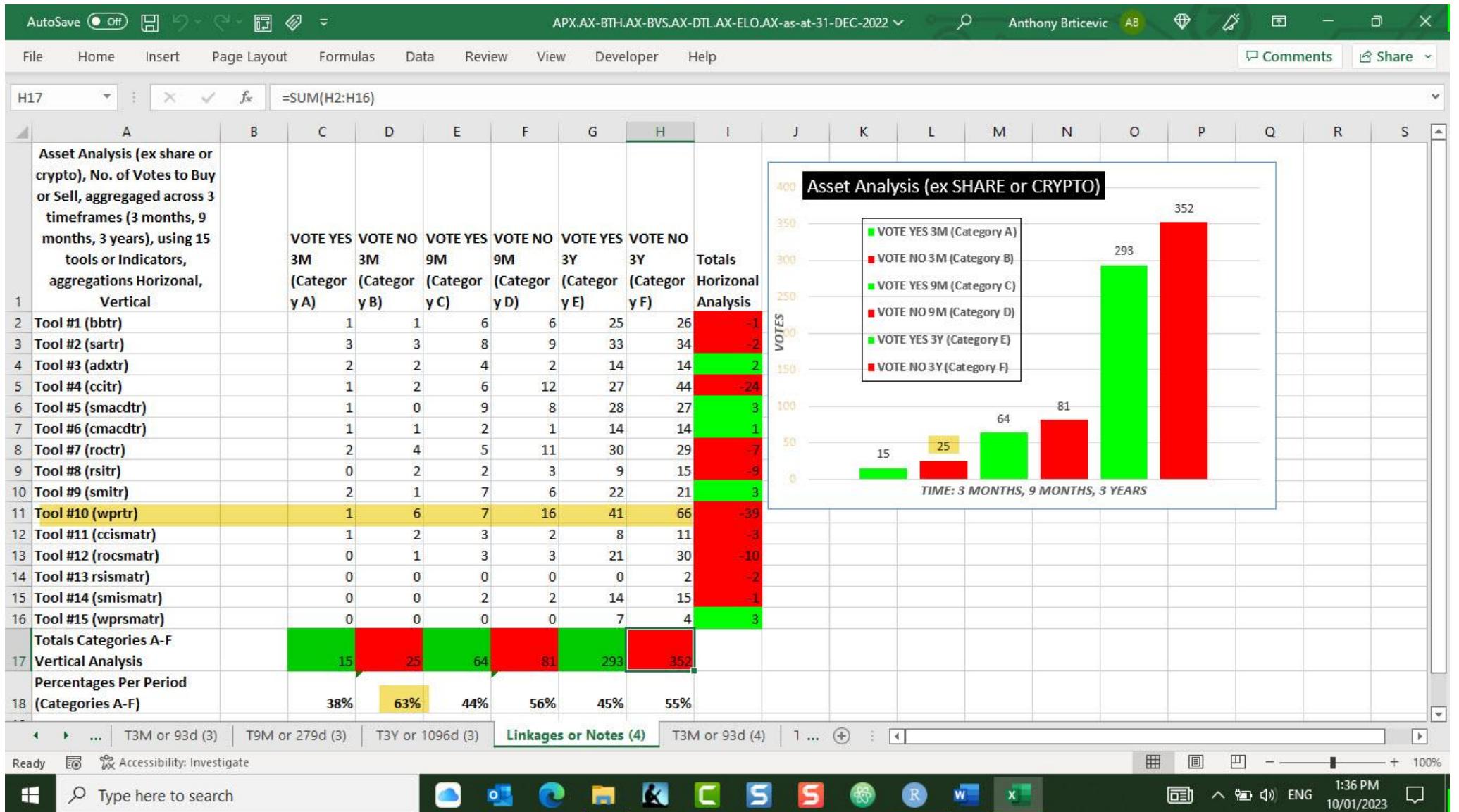
**2**

0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	-1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
-1	0	0	-1	0	0	0	-1	0	-1	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	-1	0	-1	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	-1	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	-1	-1	0	0	0	0	0	0

T3M or 93d (3) T9M or 279d (3) T3Y or 1096d (3) Linkages or Notes (4) T3M or 93d (4) 1 ... + ⌛

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- iii) CHECK, for example, tab Linkages and Notes
- iv) Note the “percentages”, “graph” and various “totals”
- v) These are IMPORTANT ELEMENTS and numbers



- x) OPEN tab Votes % Compare tab
- y) At minimum, populate cell A2 with Yahoo code in that tab
  - i) For example, BHP or BHP.AX
  - ii) If you know the GICS, add those in Column F
  - iii) This info nicely flows through to a clearer picture
  - iv) DO a final CHECK of data and info

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A5 DTL

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Asset Code or Description	VOTE YES 3M (Category A)	VOTE NO 3M (Category B)	VOTE YES 9M (Category C)	VOTE NO 9M (Category D)	VOTE YES 3Y (Category E)	VOTE NO 3Y (Category F)	GICS code or info												
2	APX	56%	44%	64%	36%	60%	40%	Software & Services												
3	BTH	28%	72%	50%	50%	50%	50%	Software & Services												
4	BVS	48%	52%	59%	41%	60%	40%	Software & Services												
5	DTL	38%	63%	44%	56%	45%	55%	Software & Services												
6	ELO	7%	93%	55%	45%	53%	47%	Software & Services												
7																				
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Votes % Compare Linkages or Notes T3M or 93d T9M or 279d T3Y or 1096d Linkages or ... 100%

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z) PREPARE to copy Votes % Compare data to file e2 (NOTE WELL: You will PREPARE & CREATE your own Excel file, e2---please see Step 7 below---FOR GUIDANCE)

aa) RIGHT-CLICK Votes Comparison % tab

bb) ... in drop-down menu, SELECT where to move or copy

cc) CHOOSE file e2 (make sure it is open)

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A5 DTL

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Asset Code or Description	VOTE YES 3M (Category A)	VOTE NO 3M (Category B)	VOTE YES 9M (Category C)	VOTE NO 9M (Category D)	VOTE YES 3Y (Category E)	VOTE NO 3Y (Category F)	GICS code or info												
2	APX	56%	44%	64%	36%	60%	40%	Software & Services												
3	BTH	28%	72%	50%	50%	50%	50%	Software & Services												
4	BVS	48%	52%	59%	41%	60%	40%	Software & Services												
5	DTL	38%	63%	44%	56%	45%	55%	Software & Services												
6	ELO	7%	93%	55%	45%	53%	47%	Software & Services												
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Move or Copy

Move selected sheets

To book: VOTES % COMPARISONS.xlsx

Before sheet: Votes % Compare  
Votes % Compare (2)  
Votes % Compare (3)  
Votes % Compare (4)  
Votes % Compare (5)  
Votes % Compare (6)  
Votes % Compare (7)  
Votes % Compare (8)

Create a copy

OK Cancel

Votes % Compare

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## STEP 7 IN FILE E2

- dd) NOTE the first tab replicates Columns A-H from Votes % Compare tab, from file e1
- i) The intention is to aggregate or pull together analyses
  - ii) The analyses could be about 100s or even 1000s of companies
  - iii) However, in file e2, many Votes % Compare tabs will have been created
  - iv) But for each one of them, you will have copied & pasted data from them to the MASTER tab (or first tab)

AutoSave (● Off) H Search (Alt+Q) Anthony Brticevic AB

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A2 JLG

1 Asset Code or Description	2 VOTE YES 3M (Category A)	3 VOTE NO 3M (Category B)	4 VOTE YES 9M (Category C)	5 VOTE NO 9M (Category D)	6 VOTE YES 3Y (Category E)	7 VOTE NO 3Y (Category F)	8 GICS code or info	Date	Brief Fundamentals Added	P/E	Yield			
								I	J	K	L	M	N	O
2 JLG	53%	47%	39%	61%	31%	69%	Capital Goods	5/11/2022	60	0.85%				
3 MGH	65%	35%	44%	56%	44%	56%	Capital Goods	5/11/2022	11	2.42%				
4 MND	62%	38%	57%	43%	56%	44%	Capital Goods	5/11/2022	26	3.52%				
5 NWH	49%	51%	54%	46%	53%	47%	Capital Goods	5/11/2022	12	5.65%				
6 REH	62%	38%	65%	35%	44%	56%	Capital Goods	5/11/2022	25	1.47%				
7 RWC	42%	58%	66%	34%	45%	55%	Capital Goods	5/11/2022	12	4.18%				
8 SVW	60%	40%	57%	43%	47%	53%	Capital Goods	5/11/2022	18	2.45%				
9 VNT	64%	36%	40%	60%	40%	60%	Capital Goods	5/11/2022	85	3.23%				
10 CSL	48%	52%	54%	46%	46%	54%	Pharmaceutical, Biotechnology & Life Sciences	5/11/2022	37	1.12%				
11 IMU	49%	51%	74%	26%	51%	49%	Pharmaceutical, Biotechnology & Life Sciences	5/11/2022	0	0.00%				
12 TLX	32%	68%	54%	46%	47%	53%	Pharmaceutical, Biotechnology & Life Sciences	5/11/2022	0	0.00%				
13 ABC	74%	26%	60%	40%	51%	49%	Materials	5/11/2022	11	7.62%				
14 AGG	90%	10%	64%	36%	54%	46%	Materials	5/11/2022	10	2.83%				
15 AKE	62%	38%	46%	54%	45%	55%	Materials	5/11/2022	18	0.00%				
16 AMC	45%	55%	48%	52%	48%	52%	Materials	5/11/2022	21	3.68%				
17 ATM	80%	20%	34%	66%	49%	51%	Materials	5/11/2022	20	1.85%				
18 ADN	53%	47%	61%	39%	54%	46%	Materials	5/11/2022	0	0.00%				
19 AWC	84%	16%	59%	41%	54%	46%	Materials	5/11/2022	10	7.15%				
20 BKW	59%	41%	58%	42%	45%	55%	Materials	5/11/2022	4	2.91%				
21 BLD	78%	22%	71%	29%	45%	55%	Materials	5/11/2022	3	0.00%				
22 BSL	67%	33%	55%	45%	42%	58%	Materials	5/11/2022	3	2.97%				
23 CHN	68%	32%	67%	33%	46%	54%	Materials	5/11/2022	0	0.00%				
24 FMG	60%	40%	43%	57%	41%	59%		20106020	5/11/2022	6	15.61%			

Votes % Compare Votes % Compare (2) Votes % Compare (3) Votes % Compare (4) Votes % ... + : ↻

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- ee) NOTE the data sitting inside the second tab, it will be your first ever analyses tab---probably named Votes % Compare (2)
- ff) IN THAT TAB, copy and paste the data over to Votes % Compare, starting the paste at cell A1 (in the first tab)
  - i) NOTE the paste may not show the correct data
  - ii) If so, click on cell B2, referring to FORMULA BAR ABOVE
  - iii) CHANGE the last two characters to 18
  - iv) And ENTER
  - v) Check to see data is correct or matches tab Votes % Compare (2)

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A2 JLG

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Asset Code or Description	VOTE YES 3M (Category A)	VOTE NO 3M (Category B)	VOTE YES 9M (Category C)	VOTE NO 9M (Category D)	VOTE YES 3Y (Category E)	VOTE NO 3Y (Category F)	GICS code or info										
2	JLG	53%	47%	39%	61%	31%	69%	Capital Goods										
3	MGH	65%	35%	44%	56%	44%	56%	Capital Goods										
4	MND	62%	38%	57%	43%	56%	44%	Capital Goods										
5	NWH	49%	51%	54%	46%	53%	47%	Capital Goods										
6	REH	62%	38%	65%	35%	44%	56%	Capital Goods										
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Votes % Compare Votes % Compare (2) Votes % Compare (3) Votes % Compare (4) Votes % ... + : ↻

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- gg) DRAG cell B2 across to G2 to pull in all correct data
- hh) NOW, for the sake of completeness, please populate the final 3 columns H to K
  - ii) Populate I2 with current date
  - jj) Populate J2 with current Price Earnings Ratio (P/E found on Yahoo Finance)
  - kk) Finally, ADD Yield % at Column K

## PART 5 NOTES AND FURTHER ACTIONS

File e2, Votes % Comparisons contains the data you need to make BUY, SELL or DO-NOTHING decisions as to shares or assets. These data do two main things: they indicate CROWD BEHAVIOUR as to price patterns and, shows KEY FUNDAMENTALS, P/E and Yield %. If the Crowd percentages show 67% or greater for Yes votes for the trailing 3 months, the asset might be “oversold”, putting potential UPWARD pressure on price. If, on the other hand, the asset shows 51% or greater for NO votes for the trailing 3 months, the asset might be entering an “overbought” condition. That is, putting potential DOWNWARD weight on the price.

You should consider the Votes for each of the 3 periods: trailing 3 months, trailing 9 months, 3 years.

It's IMPORTANT to consider Votes next to FUNDAMENTALS. Many companies have weak or non-existent fundamentals. Checking both P/E and Yield % could be a quick and good way to temper or reduce risks associated with over-reliance on Votes data. In general, a P/E of 15 or less is not bad. And a Yield % of 5% or more is OK.

If you don't wish to do the work to produce the analyses files yourself, you can reach out. Can review up to 5 assets for a fee. Or do 1 for free.

If you do the work yourself, after setting up RStudio etc (see above), it should take not more than an 1hr to review 1 company, or Yahoo Finance code (ex BHP.AX). The Excel files act as templates, e1 and e2. And once you use them a few times, you could produce the relevant decision-making output for five companies in 1 to 2 hours. Depending on your proficiency with computers and apps.

As a final note, the data and Excel file templates can be further explored in MS Access. There, it is or would be easy to---for example---pull together data on whole Global Classification Industrial Sector (GICS) industries, potentiating trend spotting, increasing decision effectiveness. As an example, view the MS Access data below, for Software & Services (companies market capitalisation range from 250m to 1B).

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

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Descending Advanced  
Remove Sort Toggle Filter

Refresh All Save Totals Spelling

Find Replace Go To Select

Calibri 11 Text Formatting

Candidates\_Analysis

Asset Code	GICs industry group (woi)	Market Cap (M)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
SKO	Software & Services	391	1	Jan-23	78%	6/01/2023	0	0.00%
APX	Software & Services	579	1	Jan-23	56%	6/01/2023	18	4.02%
APX	Software & Services	579	1	Jan-23	56%	6/01/2023	18	4.02%
EML	Software & Services	426	1	Jan-23	55%	6/01/2023	24	0.00%
FZO	Software & Services	356	1	Jan-23	51%	6/01/2023	0	0.00%
BVS	Software & Services	413	1	Jan-23	48%	6/01/2023	8	7.89%
IFM	Software & Services	573	1	Jan-23	48%	6/01/2023	61	5.06%
TYR	Software & Services	543	1	Jan-23	44%	6/01/2023	0	0.00%
VGL	Software & Services	415	1	Jan-23	44%	6/01/2023	0	0.00%
DTL	Software & Services	972	1	Jan-23	38%	6/01/2023	36	2.64%
PPS	Software & Services	345	1	Jan-23	34%	6/01/2023	81	0.00%
BTH	Software & Services	408	1	Jan-23	28%	6/01/2023	0	0.00%
FCL	Software & Services	600	1	Jan-23	24%	6/01/2023	0	0.00%
NTO	Software & Services	307	1	Jan-23	21%	6/01/2023	0	0.00%
RDY	Software & Services	345	1	Jan-23	18%	6/01/2023	42	0.00%
ELO	Software & Services	282	1	Jan-23	7%	6/01/2023	0	0.00%

Record: 1 of 16 No Filter Search

Datasheet View Num Lock SQL

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B1 is free. Like this Quick Start Guide, B1 gets you going as an analyst. B1 gives you enough info to produce e2 file data, which should be enough for making buy, sell or do-nothing decisions.

B1 focuses on Australian-listed companies where valuation is or had been between 250 million up to 1 billion. B2 has a small cost. It focuses on companies where value is or had been greater than 1 billion. Included is a small case study in which the author applied the Votes percentage system to both buy and subsequently sell BHP.AX at a profit. BHP trailing 3-month data showed 76% Yes Votes, which is greater than 67%. A buy decision was made.

In subsequent months, BHP trailing 3-month data showed NO Votes greater than 51%. Triggering attempts to sell at a profit. Within about 6 months total, BHP was sold at a profit---10% or more---but not more than 20%.

B1 and B2 are similar in structure and content. Yet B2 points at price patterns for larger entities. B2 includes more screenshots from MS Access as you might want to explore setting up your own database.

Video tutorials or demos may well be produced. The idea will be to make it easy for you to get and use high-quality info for decision-making purposes. And, if you prefer an audio modality, that in time, will be considered.

Any feedback or suggestions can be emailed to [anthonybrticevic@gmail.com](mailto:anthonybrticevic@gmail.com). We can also talk about review as a service via email or LinkedIn.

# PART 6 CASE STUDY ON DTL A WALK IN PARK VIEW FOR MS EXCEL FILES & A MS ACCESS FILE

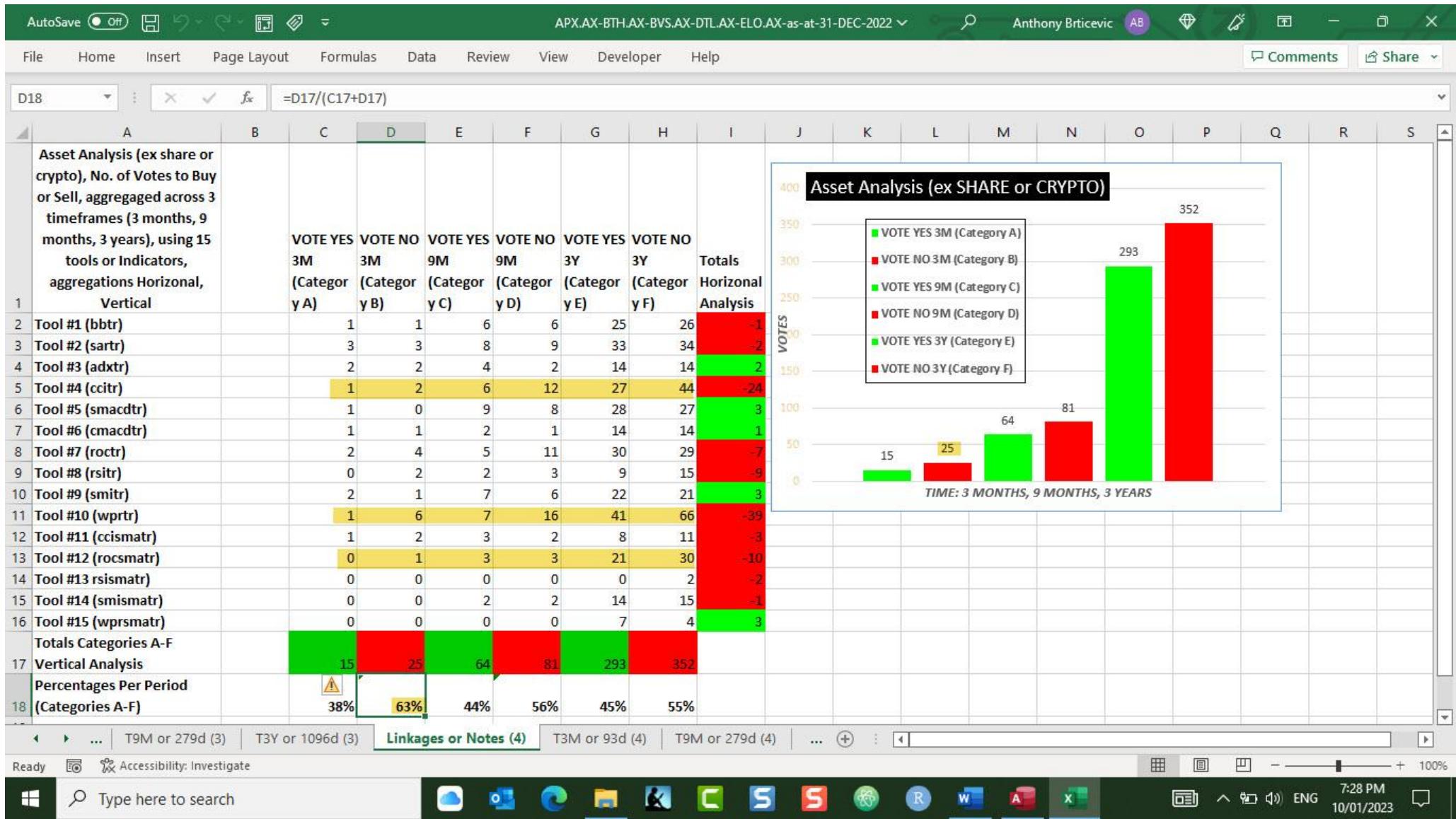
IN this section, we move on to reviewing the Excel output for the DTL entity. The intent or aim is to check out results as to the Votes system; that is, via two tabs in file e1, namely: Linkages or Notes, and Votes % Comparison. After which, we go to file e2, reviewing DTL one more time BUT THIS TIME reading a greater OR more meaningful Votes % Comparison tab---where the output---can be compared to OTHER SECTORS, or more companies in same GICS.

## LINKAGES OR NOTES TAB VIEW

In the Linkages or Notes tab of e1, a variety of output is highlighted. First notice cell D18. It shows 63% No votes for the trailing 3 months. It seems the crowd is saying DTL is relatively expensive now. The author, in general, will not consider a share for purchase unless and until the Yes vote is 67% or more for the trailing 3 months.

Row 5 and cell I5 contain results for the Commodity Channel Index, Tool #4 (ccitr). Votes show -24. Minus 10 or more might be significant. Or plus 10 or more. Also notice rows 11 and 13. If unsure of any terms, check the glossary.

Finally, look at the graph. The number 25 is highlighted. That corresponds back to cell D18. The graph shows---briefly---the Vertical Analysis output. Generally, the output from the Vertical Analysis is more important than output from the Horizontal Analysis. Vertical Analysis combines Votes from all 15 tools. Horizontal Analysis only shows data aggregated on a tool-by-tool basis.



## VOTES % COMPARE TAB VIEW

In the Votes % Compare tab of file e1, DTL data is highlighted. Votes data is highlighted for 3 months, 9 months, and 3 years. The GICS sector is SHOWN.

If we were to rank the output for each of the 3 periods, DTL would have the lowest Yes vote 2 of 3 times (see cells F5, d5). Yet, for the trailing 3 months, DTL experienced a change in rank (see cell B5). On Yes votes, it went from being last or 5<sup>th</sup> to being 3<sup>rd</sup>. When you do analyses, it's not a bad idea to do batches of companies from the same GICS grouping. That way, you can compare signals or percentages for similar companies.

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L12 X ✓ fx

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Asset Code or Description	VOTE YES 3M (Category A)	VOTE NO 3M (Category B)	VOTE YES 9M (Category C)	VOTE NO 9M (Category D)	VOTE YES 3Y (Category E)	VOTE NO 3Y (Category F)	GICS code or info												
2	APX	56%	44%	64%	36%	60%	40%	Software & Services												
3	BTH	28%	72%	50%	50%	50%	50%	Software & Services												
4	BVS	48%	52%	59%	41%	60%	40%	Software & Services												
5	DTL	38%	63%	44%	56%	45%	55%	Software & Services												
6	ELO	7%	93%	55%	45%	53%	47%	Software & Services												
7																				
8																				
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Votes % Compare Linkages or Notes T3M or 93d T9M or 279d T3Y or 1096d Linkages or ... + 100%

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## VOTES % COMPARISON FILE VIEW

In the Votes % Comparison tab of file e2, analyses are pulled together or consolidated. IN ADDITION, two new columns are added P/E (price-to-earnings ratio) and Yield.

Notice DTL is highlighted at row 492. You can compare DTL Votes output to the companies from the same GICS. Or from different GICS. Or do both.

Columns J & K add FUNDAMENTAL data. These should indicate the probability of being paid dividends. SUPER important. As a guide, the author looks for companies with P/E ratios of 15 or less. And looks for Yields of 5% or more. If companies don't meet or beat those criteria, the author tends to ignore them for the moment. AS you can see DTL doesn't meet those criteria (see cells J492, K492).

AutoSave (● Off) H Search (Alt+Q) Anthony Brticevic AB

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K511

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Asset Code or Description	VOTE YES 3M (Category A)	VOTE NO 3M (Category B)	VOTE YES 9M (Category C)	VOTE NO 9M (Category D)	VOTE YES 3Y (Category E)	VOTE NO 3Y (Category F)	GICS code or info	Date Added	Brief Fundamentals	P/E	Yield				
486	TRA	57%	43%	45%	55%	31%	69%	Retailing	5/01/2023	10	6.51%					
487	UNI	52%	48%	51%	49%	47%	53%	Retailing	5/01/2023	18	4.05%					
488	SLX	67%	33%	44%	56%	48%	52%	Semiconductors & Semiconductor Equipment	5/01/2023	0	0.00%					
489	APX	56%	44%	64%	36%	60%	40%	Software & Services	6/01/2023	18	4.02%					
490	BTH	28%	72%	50%	50%	50%	50%	Software & Services	6/01/2023	0	0.00%					
491	BVS	48%	52%	59%	41%	60%	40%	Software & Services	6/01/2023	8	7.89%					
492	DTL	38%	63%	44%	56%	45%	55%	Software & Services	6/01/2023	36	2.64%					
493	ELO	7%	93%	55%	45%	53%	47%	Software & Services	6/01/2023	0	0.00%					
494	EML	55%	45%	70%	30%	56%	44%	Software & Services	6/01/2023	24	0.00%					
495	FCL	24%	76%	55%	45%	51%	49%	Software & Services	6/01/2023	0	0.00%					
496	FZO	51%	49%	57%	43%	51%	49%	Software & Services	6/01/2023	0	0.00%					
497	IFM	48%	52%	60%	40%	56%	44%	Software & Services	6/01/2023	61	5.06%					
498	NTO	21%	79%	36%	64%	44%	56%	Software & Services	6/01/2023	0	0.00%					
499	PPS	34%	66%	46%	54%	49%	51%	Software & Services	6/01/2023	81	0.00%					
500	RDY	18%	82%	48%	52%	44%	56%	Software & Services	6/01/2023	42	0.00%					
501	RUL	57%	43%	55%	45%	45%	55%	Software & Services	6/01/2023	0	0.00%					
502	SKO	78%	22%	69%	31%	53%	47%	Software & Services	6/01/2023	0	0.00%					
503	TYR	44%	56%	53%	47%	53%	47%	Software & Services	6/01/2023	0	0.00%					
504	VGL	44%	56%	46%	54%	55%	45%	Software & Services	6/01/2023	0	0.00%					
505	AD8	46%	54%	49%	51%	50%	50%	Technology Hardware & Equipment	6/01/2023	0	0.00%					
506	WBT	14%	86%	48%	52%	51%	49%	Technology Hardware & Equipment	6/01/2023	0	0.00%					
507	ABB	24%	76%	61%	39%	46%	54%	Telecommunication Services	6/01/2023	92	0.00%					
508	SLC	72%	28%	65%	35%	57%	43%	Telecommunication Services	6/01/2023	0	0.00%					
	Total	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

Votes % Compare

Votes % Compare (2) Votes % Compare (3) Votes % Compare (4) Votes % ... + ⌂

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7:36 PM ENG 10/01/2023

# MS ACCESS CANDIDATE ANALYSIS VIEW (AS 1 OF 16 IN LIST OF GICS SOFTWARE & SERVICES)

IN THIS section, MS Access output is shown. It pulls together and consolidates data from Excel file e2 and a variety of other sources. The idea is to show you GICS and Votes data or info. The results show for ASX-listed companies whose market caps were between 250 million to 1 billion in 2022.

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

If the answer is Yes to all 3 questions, the entity COULD BE a candidate for purchase. DTL does NOT answer Yes at all. And most of the Software & Services sector---at that time---answered No to those criteria. Except SKO. SKO had had a Yes vote of 78% for the trailing 3 months.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
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Asset Code GICs industry group (wo) Market Cap (M) Analysed at Least Once (yes = 1) Month & Year VOTE YES 3M Date Brief Fundamentals Added P/E Yield

Asset Code	GICs industry group (wo)	Market Cap (M)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
SKO	Software & Services	391	1	Jan-23	78%	6/01/2023	0	0.00%
RUL	Software & Services	369	1	Jan-23	57%	6/01/2023	0	0.00%
APX	Software & Services	579	1	Jan-23	56%	6/01/2023	18	4.02%
EML	Software & Services	426	1	Jan-23	55%	6/01/2023	24	0.00%
FZO	Software & Services	356	1	Jan-23	51%	6/01/2023	0	0.00%
BVS	Software & Services	413	1	Jan-23	48%	6/01/2023	8	7.89%
IFM	Software & Services	573	1	Jan-23	48%	6/01/2023	61	5.06%
TYR	Software & Services	543	1	Jan-23	44%	6/01/2023	0	0.00%
VGL	Software & Services	415	1	Jan-23	44%	6/01/2023	0	0.00%
DTL	Software & Services	972	1	Jan-23	38%	6/01/2023	36	2.64%
PPS	Software & Services	345	1	Jan-23	34%	6/01/2023	81	0.00%
BTH	Software & Services	408	1	Jan-23	28%	6/01/2023	0	0.00%
FCL	Software & Services	600	1	Jan-23	24%	6/01/2023	0	0.00%
NTO	Software & Services	307	1	Jan-23	21%	6/01/2023	0	0.00%
RDY	Software & Services	345	1	Jan-23	18%	6/01/2023	42	0.00%
ELO	Software & Services	282	1	Jan-23	7%	6/01/2023	0	0.00%

Record: 1 of 16 No Filter Search

Datasheet View Caps Lock Num Lock SQL

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7:39 PM 10/01/2023

# PART 7 CASE STUDY MS ACCESS SCREENSHOTS & INFO FOR AN ALPHABETICAL LIST BY GICS OF BIG (250M-1B MARKET CAP IN 2022) AUSTRALIAN-LISTED COMPANIES

## GICS AUTOMOBILES & COMPONENTS

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

HERE, PWH did not pass any of the criteria.

Navigation Pane

File Home Create External Data Database Tools Help

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View  
Views

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code GICs industry group (wor Market Cap (M) Analysed at Least Once (yes = 1) Month & Ye VOTE YES 3M Date Brief Fundamentals Added P/E Yield

Asset Code	GICs industry group (wor	Market Cap (M)	Analysed at Least Once (yes = 1)	Month & Ye	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
PWH	Automobiles & Component	860	1	Nov-22	37%	28/11/2022	54	1.07%

Record: 1 of 1 No Filter Search

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## GICS BANKS

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 3 entities qualified RMC, ABA, and AFG. Could mean the tools have seen them as relatively cheap.

ON question 2, all 6 would have passed.

On question 3, again all 6 would have passed. Only the top 3 rows qualified as purchase candidates, answering Yes to all 3 criteria.

When the author sees that, the author adds the entity(ies) to a Watch List. If you have a Stocks app on your smartphone, you could do the same.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (woi)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
RMC	Banks	578	1	Nov-22	87%	30/11/2022	4	8.25%
ABA	Banks	296	1	Nov-22	79%	30/11/2022	10	7.33%
AFG	Banks	489	1	Nov-22	76%	30/11/2022	12	11.60%
PPM	Banks	751	1	Nov-22	64%	30/11/2022	5	9.93%
KSL	Banks	252	1	Nov-22	58%	30/11/2022	8	12.19%
MYS	Banks	503	1	Nov-22	42%	30/11/2022	14	5.62%

Record: 1 of 6 No Filter Search

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7:47 PM 10/01/2023

## GICS CAPITAL GOODS

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 2 entities qualified LIS and EHL. Could mean the tools have seen them as relatively cheap.

ON question 2, 5 of 8 would have passed.

On question 3, only 2 would have met or better. NONE qualified as purchase candidates---NOT---answering Yes to all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (woi)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
LIS	Capital Goods	464	1	Dec-22	95%	2/12/2022	0	0.00%
EHL	Capital Goods	431	1	Dec-22	79%	2/12/2022	7	3.14%
SST	Capital Goods	376	1	Dec-22	63%	2/12/2022	9	3.86%
ASB	Capital Goods	966	1	Dec-22	53%	2/12/2022	11	3.28%
SSM	Capital Goods	622	1	Dec-22	45%	2/12/2022	18	2.80%
SRG	Capital Goods	312	1	Dec-22	45%	2/12/2022	14	4.32%
CVL	Capital Goods	301	1	Dec-22	42%	2/12/2022	6	6.50%
GWA	Capital Goods	572	1	Dec-22	29%	2/12/2022	17	7.48%

Record: 1 of 8 No Filter Search

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7:50 PM 10/01/2023

## GICS CLASS PEND

- N/A

## GICS COMMERCIAL & PROFESSIONAL SERVICES

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 2 entities qualified SGF and SIQ. Could mean the tools have seen them as relatively cheap.

ON question 2, 2 would have passed.

On question 3, again 2 would have met or better. The author would have added SGF and SIQ to a Watch List. As they both passed all 3 criteria at a point in time.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Candidates\_Analysis

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
SGF	Commercial & Professional Services	919	1	Dec-22	83%	7/12/2022	10	8.57%
SIQ	Commercial & Professional Services	961	1	Dec-22	71%	7/12/2022	10	7.10%
C79	Commercial & Professional Services	375	1	Dec-22	62%	7/12/2022	0	0.00%
MAD	Commercial & Professional Services	582	1	Dec-22	53%	7/12/2022	26	1.09%
PPE	Commercial & Professional Services	331	1	Dec-22	13%	7/12/2022	18	4.01%

Record: 1 of 5 No Filter Search

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7:54 PM 10/01/2023

## GICS CONSUMER DURABLES & APPAREL

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 1 entity qualified AKP. Possibly cheap.

ON question 2, AKP would have failed.

On question 3, again AKP would have failed.

Navigation Pane

File Home Create External Data Database Tools Help

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View  
Views

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Candidates\_Analysis

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Ye	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
AKP	Consumer Durables & Apparel	476 1		Dec-22	73%	7/12/2022	0	0.00%

Record: 1 of 1 No Filter Search

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## GICS CONSUMER SERVICES

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 2 entities would have passed, PFP and ALG. Possibly cheap.

ON question 2, all 8 would have failed.

On question 3, only ALG and HLO would have passed. HOWEVER, none of the 8 companies would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Candidates\_Analysis

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
PFP	Consumer Services	583	1	Dec-22	75%	8/12/2022	0	2.90%
ALG	Consumer Services	261	1	Dec-22	66%	8/12/2022	0	158.86%
GEM	Consumer Services	855	1	Dec-22	64%	8/12/2022	33	4.12%
BET	Consumer Services	411	1	Dec-22	64%	8/12/2022	0	0.00%
HLO	Consumer Services	316	1	Dec-22	62%	8/12/2022	0	6.49%
MMM	Consumer Services	832	1	Dec-22	59%	8/12/2022	0	0.00%
AGI	Consumer Services	330	1	Dec-22	58%	8/12/2022	37	0.00%
JIN	Consumer Services	893	1	Dec-22	37%	8/12/2022	29	2.92%

Record: 1 of 8 | No Filter | Search

Datasheet View Num Lock SQL

Type here to search

Windows Start button

7:58 PM 10/01/2023

## GICS DIVERSIFIED FINANCIALS

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 3 entities would have passed, CVW, COG, and AEF. Possibly cheap.

ON question 2, 5 of 15 would have passed.

On question 3, 6 of 15 would have passed. HOWEVER, only COG would have met all 3 criteria. In other words, only 1 in 15 met all 3 criteria as to being a possible purchase candidate.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Candidates\_Analysis

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
CVW	Diversified Financials	442	1	Dec-22	80%	9/12/2022	24	4.21%
COG	Diversified Financials	339	1	Dec-22	76%	9/12/2022	15	5.20%
AEF	Diversified Financials	785	1	Dec-22	73%	9/12/2022	53	1.35%
ECX	Diversified Financials	753	1	Dec-22	64%	9/12/2022	6	0.00%
ZIP	Diversified Financials	846	1	Dec-22	61%	9/12/2022	0	0.00%
MNY	Diversified Financials	490	1	Dec-22	59%	9/12/2022	8	7.01%
EQT	Diversified Financials	559	1	Dec-22	56%	9/12/2022	22	3.92%
NGI	Diversified Financials	350	1	Dec-22	50%	9/12/2022	5	10.46%
HUM	Diversified Financials	265	1	Dec-22	50%	9/12/2022	0	5.14%
CVC	Diversified Financials	281	1	Dec-22	48%	9/12/2022	39	4.50%
BFG	Diversified Financials	373	1	Dec-22	48%	9/12/2022	10	8.57%
PAC	Diversified Financials	444	1	Dec-22	39%	9/12/2022	0	5.06%
RPL	Diversified Financials	594	1	Dec-22	38%	9/12/2022	118	13.26%
OFX	Diversified Financials	663	1	Dec-22	36%	9/12/2022	22	0.00%
QAL	Diversified Financials	664	1	Dec-22	31%	9/12/2022	48	1.67%

Record: 1 of 15 | No Filter | Search

Datasheet View Num Lock SQL

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8:00 PM 10/01/2023

## GICS ENERGY

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 4 entities would have passed, COE, RLT, MAY and DYL. Possibly cheap.

ON question 2, 1 of 11 would have passed.

On question 3, 2 of 11 would have passed. HOWEVER, none of the 11 entities would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Candidates\_Analysis

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
COE	Energy	591	1	Dec-22	84%	14/12/2022	0	0.00%
RLT	Energy	395	1	Dec-22	76%	14/12/2022	0	0.00%
MAY	Energy	290	1	Dec-22	73%	14/12/2022	0	19.49%
DYL	Energy	596	1	Dec-22	73%	14/12/2022	0	0.00%
ERA	Energy	959	1	Dec-22	65%	14/12/2022	0	0.00%
TER	Energy	654	1	Dec-22	59%	14/12/2022	4	17.75%
NWE	Energy	295	1	Dec-22	50%	14/12/2022	0	0.00%
CVN	Energy	369	1	Dec-22	50%	14/12/2022	0	0.00%
BMN	Energy	305	1	Dec-22	46%	14/12/2022	0	0.00%
STX	Energy	575	1	Dec-22	42%	14/12/2022	0	0.00%
RNU	Energy	464	1	Dec-22	30%	14/12/2022	0	0.00%

Record: 1 of 11 | No Filter | Search

Datasheet View Num Lock SQL

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8:02 PM 10/01/2023

## GICS FOOD & STAPLES RETAILING

- N/A

## GICS FOOD, BEVERAGE & TOBACCO

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 3 entities would have passed, BUB, SGLLV, and SM1. Possibly cheap.

ON question 2, 3 of 9 would have passed.

On question 3, 2 of 9 would have passed. HOWEVER, only SGLLV would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Ye	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
BUB	Food, Beverage & Tobacco	456	1	Dec-22	86%	16/12/2022	0	0.00%
SGLLV	Food, Beverage & Tobacco	456	1	Dec-22	83%	16/12/2022	9	10.46%
SM1	Food, Beverage & Tobacco	633	1	Dec-22	75%	16/12/2022	21	0.00%
LGL	Food, Beverage & Tobacco	303	1	Dec-22	61%	16/12/2022	10	7.97%
UMG	Food, Beverage & Tobacco	984	1	Dec-22	61%	16/12/2022	84	1.48%
CBO	Food, Beverage & Tobacco	580	1	Dec-22	55%	16/12/2022	23	2.22%
RIC	Food, Beverage & Tobacco	554	1	Dec-22	52%	16/12/2022	16	4.88%
FSF	Food, Beverage & Tobacco	308	1	Dec-22	44%	16/12/2022	8	4.95%
SHV	Food, Beverage & Tobacco	582	1	Dec-22	27%	16/12/2022	82	0.48%

Record: 1 of 9 No Filter Search

Datasheet View Num Lock SQL

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8:06 PM 10/01/2023

## GICS HEALTH CARE EQUIPMENT & SERVICES

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 4 entities would have passed, SIG, OCA, RHY and ACL. Possibly cheap.

ON question 2, 1 of 11 would have passed.

On question 3, 1 of 11 would have passed. ONLY ACL would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Clipboard Sort & Filter Records Find Text Formatting

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Ye	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
SIG	Health Care Equipment & Services	704	1	Dec-22	85%	17/12/2022	0	2.63%
OCA	Health Care Equipment & Services	661	1	Dec-22	73%	17/12/2022	16	3.91%
RHY	Health Care Equipment & Services	312	1	Dec-22	72%	17/12/2022	0	0.00%
ACL	Health Care Equipment & Services	982	1	Dec-22	71%	17/12/2022	4	26.37%
CAJ	Health Care Equipment & Services	323	1	Dec-22	62%	17/12/2022	32	3.17%
AVR	Health Care Equipment & Services	346	1	Dec-22	58%	17/12/2022	0	0.00%
MVF	Health Care Equipment & Services	411	1	Dec-22	53%	17/12/2022	20	4.42%
IDX	Health Care Equipment & Services	734	1	Dec-22	51%	17/12/2022	44	1.99%
PSQ	Health Care Equipment & Services	263	1	Dec-22	46%	17/12/2022	0	0.00%
EHE	Health Care Equipment & Services	512	1	Dec-22	42%	17/12/2022	202	2.30%
CGS	Health Care Equipment & Services	312	1	Dec-22	38%	17/12/2022	30	0.00%

Record: 1 of 11 | No Filter | Search

Datasheet View Num Lock SQL

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8:08 PM 10/01/2023

## GICS HOUSEHOLD & PERSONAL PRODUCTS

- N/A

## GICS INSURANCE

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, GDG would have passed. Possibly cheap.

ON question 2, GDG would have failed.

On question 3, GDG would have failed. GDG would NOT have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Clipboard Sort & Filter Records Find Text Formatting

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Ye	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
GDG	Insurance	260 1		Dec-22	71%	21/12/2022	124	1.73%

Record: 1 of 1 No Filter Search

Datasheet View Num Lock SQL

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8:10 PM 10/01/2023

## GICS MATERIALS

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 11 entities would have passed, BCB, BSE, ASM, COB, JMS, RSG, NMT, MCR, HAS, SBM, and PAN. Possibly cheap.

ON question 2, 15 of 54 would have passed.

On question 3, 4 of 54 would have passed. ONLY BSE would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Clipboard Sort & Filter Records Find Text Formatting

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Ye	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
BCB	Materials	464	1	Dec-22	83%	21/12/2022	0	0.00%
BSE	Materials	359	1	Dec-22	83%	21/12/2022	3	26.67%
ASM	Materials	604	1	Dec-22	80%	21/12/2022	0	0.00%
COB	Materials	284	1	Dec-22	80%	21/12/2022	0	0.00%
JMS	Materials	401	1	Dec-22	78%	22/12/2022	8	9.30%
RSG	Materials	325	1	Dec-22	77%	23/12/2022	0	0.00%
NMT	Materials	756	1	Dec-22	73%	23/12/2022	28	0.00%
MCR	Materials	983	1	Dec-22	70%	23/12/2022	0	0.00%
HAS	Materials	466	1	Dec-22	68%	22/12/2022	0	0.00%
SBM	Materials	864	1	Dec-22	68%	23/12/2022	0	0.00%
PAN	Materials	482	1	Dec-22	67%	23/12/2022	0	0.00%
RED	Materials	671	1	Dec-22	66%	23/12/2022	0	0.00%
ALK	Materials	464	1	Dec-22	66%	21/12/2022	6	0.00%
AIS	Materials	369	1	Dec-22	66%	21/12/2022	6	0.00%
DRE	Materials	282	1	Dec-22	63%	21/12/2022	0	0.00%
PGH	Materials	767	1	Dec-22	62%	23/12/2022	26	4.85%
BCI	Materials	296	1	Dec-22	62%	21/12/2022	9	0.00%
MGX	Materials	617	1	Dec-22	62%	23/12/2022	0	0.00%
BCK	Materials	376	1	Dec-22	61%	21/12/2022	0	0.00%
BOE	Materials	870	1	Dec-22	58%	21/12/2022	21	0.00%
MAH	Materials	355	1	Dec-22	58%	23/12/2022	14	5.38%
MNS	Materials	446	1	Dec-22	58%	23/12/2022	0	0.00%
NWF	Materials	321	1	Dec-22	58%	23/12/2022	0	0.00%
CTM	Materials	457	1	Dec-22	55%	21/12/2022	0	0.00%

Record: 1 of 54 | No Filter | Search

Datasheet View Num Lock SQL

Type here to search

8:11 PM 10/01/2023

## GICS MEDIA & ENTERTAINMENT

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, ONLY PLY would have passed. Possibly cheap.

ON question 2, 6 of 9 would have passed.

On question 3, 3 of 9 would have passed. NONE of the 9 would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Ye	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
PLY	Media & Entertainment	317	1	Dec-22	77%	29/12/2022	62	0.00%
HTI	Media & Entertainment	404	1	Dec-22	63%	29/12/2022	10	10.47%
OML	Media & Entertainment	748	1	Dec-22	61%	29/12/2022	129	1.95%
SWM	Media & Entertainment	818	1	Dec-22	61%	29/12/2022	3	0.00%
EGG	Media & Entertainment	305	1	Dec-22	58%	29/12/2022	10	4.56%
SXL	Media & Entertainment	317	1	Dec-22	55%	29/12/2022	9	9.18%
FDV	Media & Entertainment	369	1	Dec-22	48%	29/12/2022	0	0.00%
SKT	Media & Entertainment	411	1	Dec-22	38%	29/12/2022	6	3.69%
IGL	Media & Entertainment	325	1	Dec-22	23%	29/12/2022	13	6.90%

Record: 1 of 9 No Filter Search

Datasheet View Num Lock SQL

Type here to search

8:13 PM 10/01/2023

## GICS NOT APPLIC

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 3 would have passed, PGF, CDM, and ALI. Possibly cheap.

ON question 2, 14 of 23 would have passed.

On question 3, 14 of 23 would have passed. Only PFG and CDM would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Clipboard Sort & Filter Records Find Text Formatting

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
PGF	Not Applic	637	1	Jan-23	76%	1/01/2023	6	6.17%
CDM	Not Applic	279	1	Jan-23	75%	1/01/2023	6	9.04%
ALI	Not Applic	418	1	Jan-23	69%	1/01/2023	14	3.38%
WHF	Not Applic	582	1	Jan-23	62%	1/01/2023	32	4.07%
QRI	Not Applic	568	1	Jan-23	54%	1/01/2023	17	6.63%
PL8	Not Applic	679	1	Jan-23	51%	1/01/2023	7	5.62%
MOT	Not Applic	548	1	Jan-23	50%	1/01/2023	10	7.18%
WGB	Not Applic	719	1	Jan-23	47%	1/01/2023	6	6.36%
WAX	Not Applic	302	1	Jan-23	47%	1/01/2023	8	7.81%
MIR	Not Applic	578	1	Jan-23	43%	1/01/2023	71	3.53%
HM1	Not Applic	590	1	Jan-23	43%	1/01/2023	0	11.54%
AMH	Not Applic	350	1	Jan-23	42%	1/01/2023	35	5.85%
VG1	Not Applic	638	1	Jan-23	42%	1/01/2023	0	0.00%
DJW	Not Applic	694	1	Jan-23	41%	1/01/2023	17	4.98%
FGX	Not Applic	484	1	Jan-23	41%	1/01/2023	6	5.65%
PIA	Not Applic	289	1	Jan-23	40%	1/01/2023	5	5.90%
PIC	Not Applic	462	1	Jan-23	40%	1/01/2023	6	4.83%
FGG	Not Applic	479	1	Jan-23	35%	1/01/2023	10	6.17%
CIN	Not Applic	820	1	Jan-23	33%	1/01/2023	24	2.94%
GCI	Not Applic	486	1	Jan-23	31%	1/01/2023	25	7.68%
PE1	Not Applic	417	1	Jan-23	23%	1/01/2023	6	3.88%
PAI	Not Applic	316	1	Jan-23	21%	1/01/2023	0	5.85%
PMC	Not Applic	383	1	Jan-23	6%	1/01/2023	10	4.72%

Record: 1 of 23 | No Filter | Search

Datasheet View Num Lock SQL

Type here to search

8:14 PM 10/01/2023

## GICS PHARMACEUTICALS, BIOTECHNOLOGY & LIFE SCIENCES

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 5 would have passed, IHL, MYX, OPT, TRJ and RAC. Possibly cheap.

ON question 2, NONE of the 14 entities would have passed.

On question 3, ONLY MYX would have passed. NONE of the 14 would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Paste Copy Format Painter

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Descending Advanced  
Remove Sort Toggle Filter

Refresh All Save Totals Spelling

Find Replace Go To Select

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Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
IHL	Pharmaceuticals, Biotechnology & Life Sc	346	1	Jan-23	80%	2/01/2023	0	0.00%
MYX	Pharmaceuticals, Biotechnology & Life Sc	669	1	Jan-23	80%	2/01/2023	0	19.49%
OPT	Pharmaceuticals, Biotechnology & Life Sc	489	1	Jan-23	79%	2/01/2023	0	0.00%
TRJ	Pharmaceuticals, Biotechnology & Life Sc	355	1	Jan-23	74%	2/01/2023	175	0.00%
RAC	Pharmaceuticals, Biotechnology & Life Sc	318	1	Jan-23	71%	2/01/2023	0	0.00%
SPL	Pharmaceuticals, Biotechnology & Life Sc	326	1	Jan-23	66%	2/01/2023	0	0.00%
PAR	Pharmaceuticals, Biotechnology & Life Sc	465	1	Jan-23	55%	2/01/2023	0	0.00%
PEB	Pharmaceuticals, Biotechnology & Life Sc	373	1	Jan-23	38%	2/01/2023	0	0.00%
NEU	Pharmaceuticals, Biotechnology & Life Sc	724	1	Jan-23	35%	2/01/2023	0	0.00%
MSB	Pharmaceuticals, Biotechnology & Life Sc	572	1	Jan-23	30%	2/01/2023	0	0.00%
CUV	Pharmaceuticals, Biotechnology & Life Sc	972	1	Jan-23	29%	2/01/2023	55	0.18%
IMM	Pharmaceuticals, Biotechnology & Life Sc	281	1	Jan-23	18%	2/01/2023	0	0.00%
AFP	Pharmaceuticals, Biotechnology & Life Sc	340	1	Jan-23	18%	2/01/2023	23	0.00%
ARX	Pharmaceuticals, Biotechnology & Life Sc	287	1	Jan-23	7%	2/01/2023	0	0.00%

Record: 1 of 14 No Filter Search

Datasheet View Num Lock SQL

Type here to search

8:17 PM 10/01/2023

## GICS REAL ESTATE

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, 3 would have passed, GDI, GDF, and SRV. Possibly cheap.

ON question 2, 14 of the 16 entities would have passed.

On question 3, 13 of the 16 would have passed. ONLY GDI, GDF, and SRV would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Paste Copy Format Painter

Filter Ascending Selection  
Descending Advanced  
Remove Sort Toggle Filter

Refresh All Save Totals Spelling

Find Replace Go To Select

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Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
GDI	Real Estate	496	1	Jan-23	81%	3/01/2023	6	10.13%
GDF	Real Estate	328	1	Jan-23	70%	3/01/2023	3	5.54%
SRV	Real Estate	321	1	Jan-23	70%	3/01/2023	12	6.19%
SDG	Real Estate	351	1	Jan-23	64%	3/01/2023	3	17.00%
UOS	Real Estate	866	1	Jan-23	58%	3/01/2023	10	2.44%
NPR	Real Estate	294	1	Jan-23	49%	3/01/2023	6	7.17%
WTN	Real Estate	780	1	Jan-23	47%	3/03/2023	25	0.41%
PPC	Real Estate	524	1	Jan-23	44%	3/01/2023	11	5.53%
CDP	Real Estate	319	1	Jan-23	43%	3/01/2023	5	9.05%
ECF	Real Estate	321	1	Jan-23	34%	3/01/2023	6	9.79%
DXC	Real Estate	416	1	Jan-23	33%	3/01/2023	5	7.98%
HCW	Real Estate	533	1	Jan-23	23%	3/01/2023	11	4.77%
CWP	Real Estate	364	1	Jan-23	22%	3/01/2023	10	6.70%
DXI	Real Estate	897	1	Jan-23	16%	3/01/2023	6	5.77%
AOF	Real Estate	285	1	Jan-23	12%	3/01/2023	27	6.25%
HPI	Real Estate	617	1	Jan-23	11%	3/01/2023	4	5.48%

Record: 1 of 16 No Filter Search

Datasheet View Num Lock SQL

Type here to search

8:19 PM 10/01/2023

## GICS RETAILING

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, NONE would have passed.

ON question 2, 9 of the 17 entities would have passed.

On question 3, 10 of the 17 would have passed. NONE would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Clipboard Sort & Filter Records Find Text Formatting

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
TPW	Retailing	585	1	Jan-23	66%	5/01/2023	50	0.00%
BBN	Retailing	618	1	Jan-23	65%	5/01/2023	19	5.69%
MHJ	Retailing	417	1	Jan-23	58%	5/01/2023	9	6.85%
TRA	Retailing	297	1	Jan-23	57%	5/01/2023	10	6.51%
ASG	Retailing	406	1	Jan-23	56%	5/01/2023	8	8.74%
UNI	Retailing	366	1	Jan-23	52%	5/01/2023	18	4.05%
BST	Retailing	337	1	Jan-23	51%	5/01/2023	8	12.70%
PWR	Retailing	440	1	Jan-23	49%	5/01/2023	8	9.56%
BLX	Retailing	506	1	Jan-23	47%	5/01/2023	12	4.69%
KGN	Retailing	453	1	Jan-23	43%	5/01/2023	0	0.00%
CTT	Retailing	544	1	Jan-23	39%	5/01/2023	0	0.00%
NCK	Retailing	828	1	Jan-23	38%	5/01/2023	12	6.60%
ADH	Retailing	438	1	Jan-23	31%	5/01/2023	10	9.09%
MYR	Retailing	418	1	Jan-23	28%	5/01/2023	12	7.35%
KMD	Retailing	705	1	Jan-23	24%	5/01/2023	19	5.78%
AX1	Retailing	808	1	Jan-23	15%	5/01/2023	30	4.73%
SNL	Retailing	422	1	Jan-23	11%	5/01/2023	26	2.56%

Record: 1 of 17 No Filter Search

Datasheet View Num Lock SQL

Type here to search

8:20 PM 10/01/2023

## GICS SEMICONDUCTORS & SEMICONDUCTOR EQUIPMENT

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, SLX would have passed.

ON question 2, SLX would have failed.

On question 3, SLX would have failed. SLX would NOT have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code GICs industry group (words label) Market Cap (M) Analysed at Least Once (yes = 1) Month & Year VOTE YES 3M Date Brief Fundamentals Added P/E Yield

Asset Code	GICs industry group (words label)	Market Cap (M)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
SLX	Semiconductors & Semiconductor Equipment	655	1	Jan-23	67%	5/01/2023	0	0.00%

Record: 1 of 1 No Filter Search

Datasheet View Num Lock SQL

Type here to search

8:21 PM 10/01/2023

## GICS SOFTWARE & SERVICES

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, ONLY SKO would have passed.

ON question 2, 1 of the 16 would have passed.

On question 3, 1 of the 16 would have passed. NONE would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Views

Clipboard Sort & Filter Records Find Text Formatting

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
SKO	Software & Services	391	1	Jan-23	78%	6/01/2023	0	0.00%
RUL	Software & Services	369	1	Jan-23	57%	6/01/2023	0	0.00%
APX	Software & Services	579	1	Jan-23	56%	6/01/2023	18	4.02%
EML	Software & Services	426	1	Jan-23	55%	6/01/2023	24	0.00%
FZO	Software & Services	356	1	Jan-23	51%	6/01/2023	0	0.00%
BVS	Software & Services	413	1	Jan-23	48%	6/01/2023	8	7.89%
IFM	Software & Services	573	1	Jan-23	48%	6/01/2023	61	5.06%
TYR	Software & Services	543	1	Jan-23	44%	6/01/2023	0	0.00%
VGL	Software & Services	415	1	Jan-23	44%	6/01/2023	0	0.00%
DTL	Software & Services	972	1	Jan-23	38%	6/01/2023	36	2.64%
PPS	Software & Services	345	1	Jan-23	34%	6/01/2023	81	0.00%
BTH	Software & Services	408	1	Jan-23	28%	6/01/2023	0	0.00%
FCL	Software & Services	600	1	Jan-23	24%	6/01/2023	0	0.00%
NTO	Software & Services	307	1	Jan-23	21%	6/01/2023	0	0.00%
RDY	Software & Services	345	1	Jan-23	18%	6/01/2023	42	0.00%
ELO	Software & Services	282	1	Jan-23	7%	6/01/2023	0	0.00%

Record: 1 of 16 No Filter Search

Datasheet View Num Lock SQL

Type here to search

8:23 PM 10/01/2023

## GICS TECHNOLOGY HARDWARE & EQUIPMENT

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, NONE would have passed.

ON question 2, neither of the 2 entities would have passed.

On question 3, both would have failed. NONE would have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Paste Copy Format Painter

Filter Ascending Selection Descending Advanced Remove Sort Toggle Filter

Refresh All Save Totals Spelling

Find Replace Go To Select

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Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
AD8	Technology Hardware & Equipment	697	1	Jan-23	46%	6/01/2023	0	0.00%
WBT	Technology Hardware & Equipment	492	1	Jan-23	14%	6/01/2023	0	0.00%

Record: 1 of 2 No Filter Search

Datasheet View Num Lock SQL

Type here to search

8:25 PM 10/01/2023

## GICS TELECOMMUNICATION SERVICES

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, SLC and TUA would have passed.

ON question 2, all 3 entities would have failed.

On question 3, NONE would have passed. All 3 entities would NOT have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Paste Copy Format Painter

Filter Ascending Selection Descending Advanced Remove Sort Toggle Filter

Refresh All Save Totals Spelling

Find Replace Go To Select

Calibri 11 Text Formatting

Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
SLC	Telecommunication Services	396	1	Jan-23	72%	6/01/2023	0	0.00%
TUA	Telecommunication Services	709	1	Jan-23	68%	6/01/2023	0	0.00%
ABB	Telecommunication Services	779	1	Jan-23	24%	6/01/2023	92	0.00%

Record: 1 of 3 No Filter Search

Datasheet View Num Lock SQL

Type here to search

8:27 PM 10/01/2023

## GICS TRANSPORTATION

As we go through each GICS grouping, look for companies THAT meet or beat the following 3 criteria:

1. Are the Yes votes for the trailing 3 months greater than or equal to 67%?
2. Is the P/E equal to or less than 15?
3. Is the Yield greater than or equal to 5%?

ON question 1, NONE would have passed.

ON question 2, NONE would have passed.

On question 3, AQZ would have failed. AQZ would NOT have met all 3 criteria.

Navigation Pane

File Home Create External Data Database Tools Help Tell me what you want to do

View  
Paste Copy Format Painter

Filter Ascending Selection  
Descending Advanced  
Remove Sort Toggle Filter

Refresh All Save Totals Spelling

Find Replace Go To Select

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Candidates\_Analysis ASX\_Listed\_Companies\_10-08-2022

Asset Code	GICs industry group (words label)	Market Cap (M\$)	Analysed at Least Once (yes = 1)	Month & Year	VOTE YES 3M	Date Brief Fundamentals Added	P/E	Yield
AQZ	Transportation	546.1	1	Jan-23	63%	6/01/2023	78	0.00%

Record: 1 of 1 No Filter Search

Datasheet View Num Lock SQL

Type here to search

8:28 PM 10/01/2023

## GICS UTILITIES

- N/A

# PART 8 GLOSSARY (15 VOTES TOOLS & 2 BRIEF FUNDAMENTALS)

## 15 VOTES TOOLS (SOURCE INVESTOPEDIA)

- Votes Tool #1 (bbtr) Bollinger Bands BB(20,2) Trading Strategy [Bollinger Bands®: What They Are, and What They Tell Investors \(investopedia.com\)](#)
- Votes Tool #2 (sartr) Parabolic Stop And Reverse SAR(0.02,0.2) Trading Strategy [Parabolic SAR Indicator: Definition, Formula, Trading Strategies \(investopedia.com\)](#)
- Votes Tool #3 (adxtr) Average Directional Movement Index ADX(14) Trading Strategy  
<https://www.investopedia.com/terms/d/dmi.asp>
- Votes Tool #4 (ccitr) Commodity Channel Index CCI(20,0.015) Trading Strategy  
<https://www.investopedia.com/terms/c/commoditychannelindex.asp>

- Votes Tool #5 (smacdtr) Moving Averages Covergence/Divergence MACD(12,26,9) Trading Strategies
- # Signal and Centerline Crossover Trading Strategies <https://www.investopedia.com/terms/m/macd.asp>
  
- Votes Tool #6 (cmacdtr) Moving Averages Covergence/Divergence MACD(12,26,9) Trading Strategies
- # Signal and Centerline Crossover Trading Strategies <https://www.investopedia.com/articles/forex/05/macddiverge.asp>
- Votes Tool #7 (roctr) Rate Of Change ROC(21) Trading Strategy <https://www.investopedia.com/terms/r/rateofchange.asp>
- Votes Tool #8 (rsitr) Relative Strength Index RSI(14) Trading Strategy <https://www.investopedia.com/terms/r/rsi.asp>
- Votes Tool #9 (smitr) Stochastic Momentum Index SMI(13,2,25,9) Trading Strategy  
<https://www.investopedia.com/terms/s/stochasticoscillator.asp>
- Votes Tool #10 (wprtr) Williams %R(14) Trading Strategy <https://www.investopedia.com/terms/w/williamsr.asp>
- Votes Tool #11 (ccismatr) Commodity Channel Index CCI(20,0.015) and Simple Moving Average SMA(5) Trading Strategy. Combine Simple Moving Average <https://www.investopedia.com/terms/s/sma.asp> with <https://www.investopedia.com/terms/c/commoditychannelindex.asp>
- Votes Tool #12 (rocsmatr) Rate Of Change ROC(21) and Simple Moving Average SMA(5) Trading Strategy. Combine Simple Moving Average <https://www.investopedia.com/terms/s/sma.asp> with <https://www.investopedia.com/terms/r/rateofchange.asp>
- Votes Tool #13 (rsismatr) Relative Strength Index RSI(14) and Simple Moving Average SMA(5) Trading Strategy. Combine Simple Moving Average <https://www.investopedia.com/terms/s/sma.asp> with <https://www.investopedia.com/terms/r/rsi.asp>

- Votes Tool #14 (smismatr) Stochastic Momentum Index SMI(13,2,25,9) and Simple Moving Average SMA(5) Trading Strategy. Combine Simple Moving Average <https://www.investopedia.com/terms/s/sma.asp> with <https://www.investopedia.com/terms/s/stochasticoscillator.asp>
- Votes Tool #15 (wprsmatr) Williams %R(14) and Simple Moving Average SMA(5) Trading Strategy. Combine Simple Moving Average <https://www.investopedia.com/terms/s/sma.asp> with <https://www.investopedia.com/terms/w/williamsr.asp>

## 2 BRIEF FUNDAMENTALS (SOURCE YAHOO FINANCE)

- Price Earnings Ratio (P/E) <https://finance.yahoo.com/news/ratio-analysis-price-earnings-ratio-163359357.html>
- Yield <https://finance.yahoo.com/news/calculate-dividend-yield-192351901.html>