

# 2024 Preview

How to Get More Income and  
Find More Stocks to Trade



# Our 2024 Trading Plans

- Review of results from recent survey
- Why 'Follow the Money' is important for 2024
- Divergence in stocks which will impact your income
- How I Nailed Seven Sectors in 2023
- How to get more income in 2024



# 2024 Big Picture Outlook

**2021:** Investors thought paying high prices for stocks popular with the wider public would make them rich. (nope)

**2022:** Investors thought big tech would be immune to rate increases. (nope)

**2023:** Investors thought a recession was a done deal. (nope).

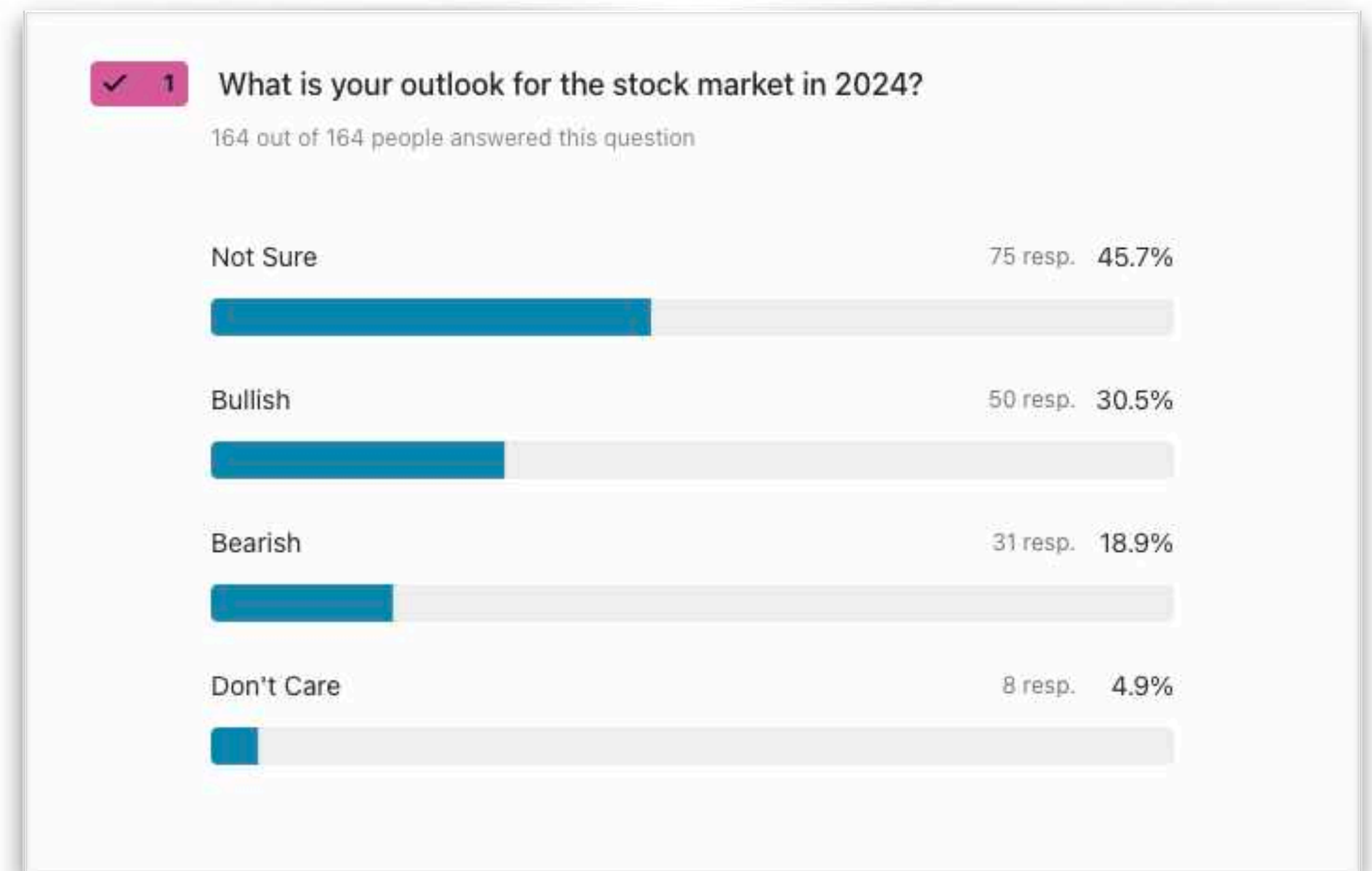
**2024:** Whatever the macro financial, economic and investment outlook, it will be wrong.

Trade the market you have not how you expect it to behave.



# 2-Question Survey Results

- **Not Sure** - Are you confident in the trades you are making or “hoping”?
- **Bullish** - with good reason as no evidence of recession (yet) and stable economy, decreasing inflation and dovish Fed.
- **Bearish** - you’ll get your correction in 2024.
- **Don’t care** - hugs.
- We want to see more people in the ‘don’t care’ category as you gain confidence to trade markets up or down for positive results.



# 2024 Bull/Bear Cases

- **Bear:** A correction is coming (Yield Curve)
- **Bull:** Economic data confirms soft/no landing
- **Bear:** Earnings (Jan/Apr)
- **Bull:** Fed is out of the way (**Mar. 20**)
- **Bull:** Treasury yields have collapsed since Aug. highs (5% → 3.9%)



*...it's not clear what happens with corporate earnings. Frankly, they haven't been very good over the past quarter.*

*Hopes of Fed rate cuts have helped investors ignore that fact, but the reality is that if earnings start to falter, **that's a problem at these valuations** and the Fed can't help that...*

# One Thing We Can Do To Help You In 2024



**34%: How to get more income**

**20%: How to find stocks**

***“Find More Stocks to Trade  
Under \$100”***

**Really? Are you sure that's what you want?**

## Selected stocks vs SPY



Please note: Performance chart does not include delisted stocks. Selected stocks line is based on market cap weighted averages and includes only stocks that have available data on Shares Outstanding. Selected stocks EW line is based on equally weighted averages.

S&P 500	100%	P/E	18.29	EPS this Y	9.80%	Perf Week	3.25%
Market Cap	8447.48B	Fwd P/E	13.73	EPS next Y	26.72%	Perf Month	5.84%
Dividend	2.80%	PEG	2.09	EPS past 5Y	14.53%	Perf Quart	3.32%
Recom	2.10	P/S	1.52	EPS next 5Y	8.73%	Perf Half	0.86%
Rel Volume	2.40	P/B	2.12	Sales past 5Y	11.14%	Perf Year	-3.01%
Avg Volume	1.46B	P/C	12.73	Float Short	2.12%	Perf YTD	-0.29%
Volume	3.50B	P/FCF	17.19	Short Ratio	2.52	Change	-0.73%

215 S&P 500  
stocks <\$100

48% Lower EPS 5-  
Year Growth Rate

-.29% YTD  
Performance

That's the current  
situation and it  
COULD change...

S&P 500 <\$100  
trading at -27%  
discount to future  
earnings



## Selected stocks vs SPY

Selected stocks 27.43

Selected stocks EW 17.24

SPY 17.51

Dec 15 2023



Please note: Performance chart does not include delisted stocks. Selected stocks line is based on market cap weighted averages and includes only stocks that have available data on Shares Outstanding. Selected stocks EW line is based on equally weighted averages.

S&P 500	100%	P/E	27.02	EPS this Y	72.44%	Perf Week	2.07%
Market Cap	34163.09B	Fwd P/E	21.46	EPS next Y	21.40%	Perf Month	4.14%
Dividend	1.03%	PEG	2.08	EPS past 5Y	21.66%	Perf Quart	6.04%
Recom	1.78	P/S	3.15	EPS next 5Y	12.97%	Perf Half	8.85%
Rel Volume	2.16	P/B	6.17	Sales past 5Y	14.43%	Perf Year	27.43%
Avg Volume	947.48M	P/C	20.46	Float Short	1.37%	Perf YTD	33.43%
Volume	2.04B	P/FCF	24.27	Short Ratio	2.03	Change	0.22%

216 S&P 500 >  
\$100

+48% higher 5-  
year EPS Growth  
Rate

+33.2% YTD  
Performance

-22% Discount to  
Forward Earnings

This is a trend  
which I believe  
continues in 2024

# Stocks Trading > \$100 per Share Outperform by 2,214% Last 12 Months

All Stocks > \$100 (519) +33% YTD

All Stocks \$5 >< \$100 (2,747) +4.5% YTD

Selected stocks vs SPY



Please note: Performance chart does not include delisted stocks. Selected stocks line is based on market cap weighted averages and includes only stocks that have available data on Shares Outstanding. Selected stocks EW line is based on equally weighted averages.

S&P 500	38%	P/E	25.83	EPS this Y	70.16%	Perf Week	2.19%
Market Cap	37267.95B	Fwd P/E	21.52	EPS next Y	21.11%	Perf Month	4.44%
Dividend	0.98%	PEG	2.05	EPS past 5Y	20.95%	Perf Quart	6.24%
Recom	1.81	P/S	3.00	EPS next 5Y	12.59%	Perf Half	9.24%
Rel Volume	1.96	P/B	5.66	Sales past 5Y	15.21%	Perf Year	27.54%
Avg Volume	1.45B	P/C	20.47	Float Short	1.58%	Perf YTD	33.36%
Volume	2.84B	P/FCF	24.10	Short Ratio	1.65	Change	0.17%

Selected stocks vs SPY



Please note: Performance chart does not include delisted stocks. Selected stocks line is based on market cap weighted averages and includes only stocks that have available data on Shares Outstanding. Selected stocks EW line is based on equally weighted averages.

S&P 500	8%	P/E	19.34	EPS this Y	35.51%	Perf Week	3.98%
Market Cap	14334.05B	Fwd P/E	14.96	EPS next Y	46.43%	Perf Month	7.32%
Dividend	2.47%	PEG	1.94	EPS past 5Y	11.11%	Perf Quart	4.80%
Recom	2.06	P/S	1.44	EPS next 5Y	9.95%	Perf Half	2.66%
Rel Volume	2.37	P/B	2.16	Sales past 5Y	37.09%	Perf Year	1.19%
Avg Volume	3.79B	P/C	10.54	Float Short	4.08%	Perf YTD	4.54%
Volume	9.00B	P/FCF	16.66	Short Ratio	3.64	Change	-0.70%

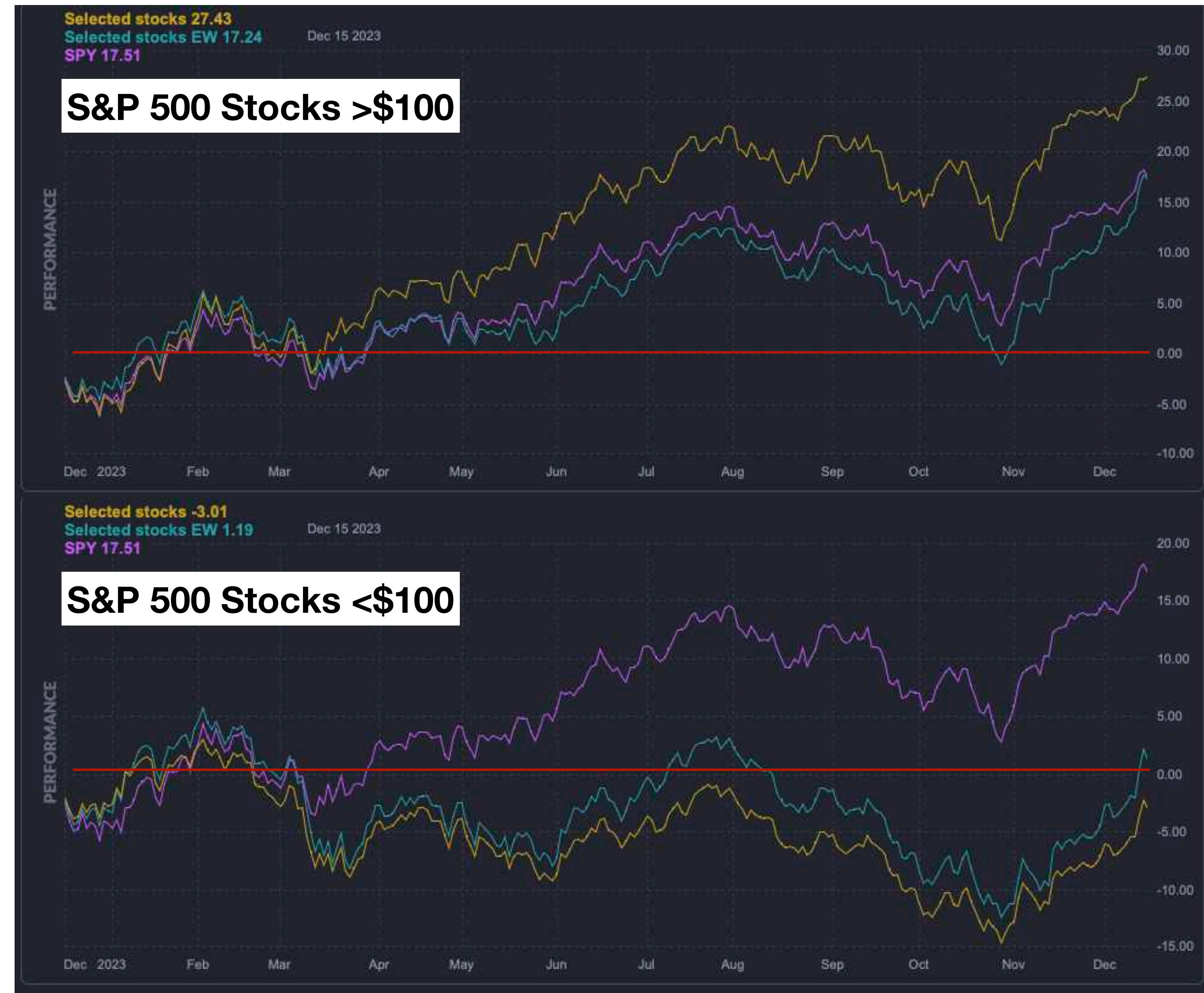
# Why You CAN'T (All Stocks)

- Best stocks for options sellers are the stocks you can't afford to trade selling single-sided Puts or Calls.
- All other stocks have higher volatility, which looks great in premium, not so great upon assignment.



# Why You CAN'T (S&P 500 Stocks)

- Average S&P 500 stock has increased from ~\$80 per share to more than \$197 per share since 2018.
- You are being priced out of the stock market.



# How to Get More Income

- **Volume:**
  - Increase number of trades you are making - this is also a function of capital.
  - Increase number of contracts traded per trade
  - DECREASE the time in trade to increase the number of trades that can be made
  - DECREASE capital (margin) per trade to increase the number of trades/volume of contracts
  - Increase capital / capital efficiency ratios
- **Velocity:**
  - Increase rate of capital turnover
  - Decrease time **OF** trade (DTE)
  - Increase Rate of Return on Capital

# How to Get More Income

Portfolio and Goal Planning						Weekly Average
Strategy	Est. Capital	Contracts	Total Capital	Freq	Vol (M)	Income (Avg)
2024 Dow 5	\$ 3,100	1	\$ 3,100	W	4	\$ 209
2024 SPX 1 Day	\$ 900	1	\$ 900	W	4	\$ 78
2024 7-Day Income	\$ 1,000	1	\$ 1,000	W	4	\$ 50
5K Challenge	\$ 20,000	20	\$ 20,000	W	5	\$ 500
Options Income Weekly	\$ 50,000	1	\$ 50,000	W	6	\$ 250
Income Masters	\$ 200,000	1	\$ 200,000	W	12	\$ 1,000
2024 3-Stock Strategy	\$ 10,000	Varies	\$ 10,000	M	3	\$ 100
Perpetual Income	\$ 50,000	1	\$ 50,000	W	3	\$ 85
2024 Cash Raid	\$ 10,000	1	\$ 10,000	W	2	\$ 33
<b>Working Capital (W)</b>	\$ 345,000		\$ 345,000		43	\$ 2,305
Weekly Return on Capital						0.7%
Annual Income Goal						\$ 119,860
Annual Return on Capital (no reinvestment)						35%

# Example: How to Get More Income

Volume

Velocity

Velocity

**\$100,000 Portfolio - Aggressive**

2024

2024

2024

2024

2024

Strategy	Est. Capital	Contracts	Total Capital	Freq	Vol (M)	Income (Avg)
Dow 5	\$ 3,100	1	\$ 3,100	W	4	\$ 209
SPX 1 Day	\$ 900	5	\$ 4,500	W	4	\$ 390
7-Day Income	\$ 1,000	4	\$ 4,000	W	4	\$ 150
5K Challenge	\$ 10,000	0	\$ -	W	5	\$ -
Options Income Weekly	\$ 50,000	1	\$ -	W	6	\$ -
Income Masters	\$ 100,000	1	\$ -	W	12	\$ -
3-Stock Strategy	\$ 10,000	Varies	\$ -	M	3	\$ -
Perpetual Income	\$ 50,000	1	\$ -	W	3	\$ -
Cash Raid	\$ 10,000	1	\$ -	W	2	\$ -
<b>Working Capital (W)</b>	\$ 235,000		\$ 11,600		43	\$ 749

Weekly Return on Capital

Velocity

6.5%

Annual Income Goal

\$ 38,948

Annual Return on Capital (no reinvestment)

336%



# How to Find Stocks

Episode #623...



# SEVEN SECTORS FOR GROWTH

3

AVERAGE METRICS FOR EACH SECTOR

SECTOR	PE	Forward PE	EPS (5YR)	PRICE	DISCOUNT	1 YR APP
SEMICONDUCTORS (MFG)	26	25.3	13%	\$76.50	-2.6%	66.7%
SEMICONDUCTOR (EQ&MAT)	21.9	26.2	13.8%	\$82.65	+19.6%	25.4%
INFORMATION TECHNOLOGY	41.6	28.5	13.2%	\$58.43	-31.5%	17.9%
SOFTWARE APPLICATION	114.7	75.5	19.2%	\$60.65	-34.2%	30%
SOFTWARE INFRASTRUCTURE	47.3	22.3	18%	\$125.52	-52.8%	10.7%
INTERNET CONTENT	69.1	39.8	8.6%	\$24.88	-42.4%	139.8%
ELECTRONIC GAMING	37.5	19.3	18.7%	\$30.06	-48.5%	50%
<b>TOTAL</b>	<b>51.2</b>	<b>33.8</b>	<b>14.9%</b>	<b>\$65.52</b>	<b>-27.5%</b>	<b>48.6%</b>

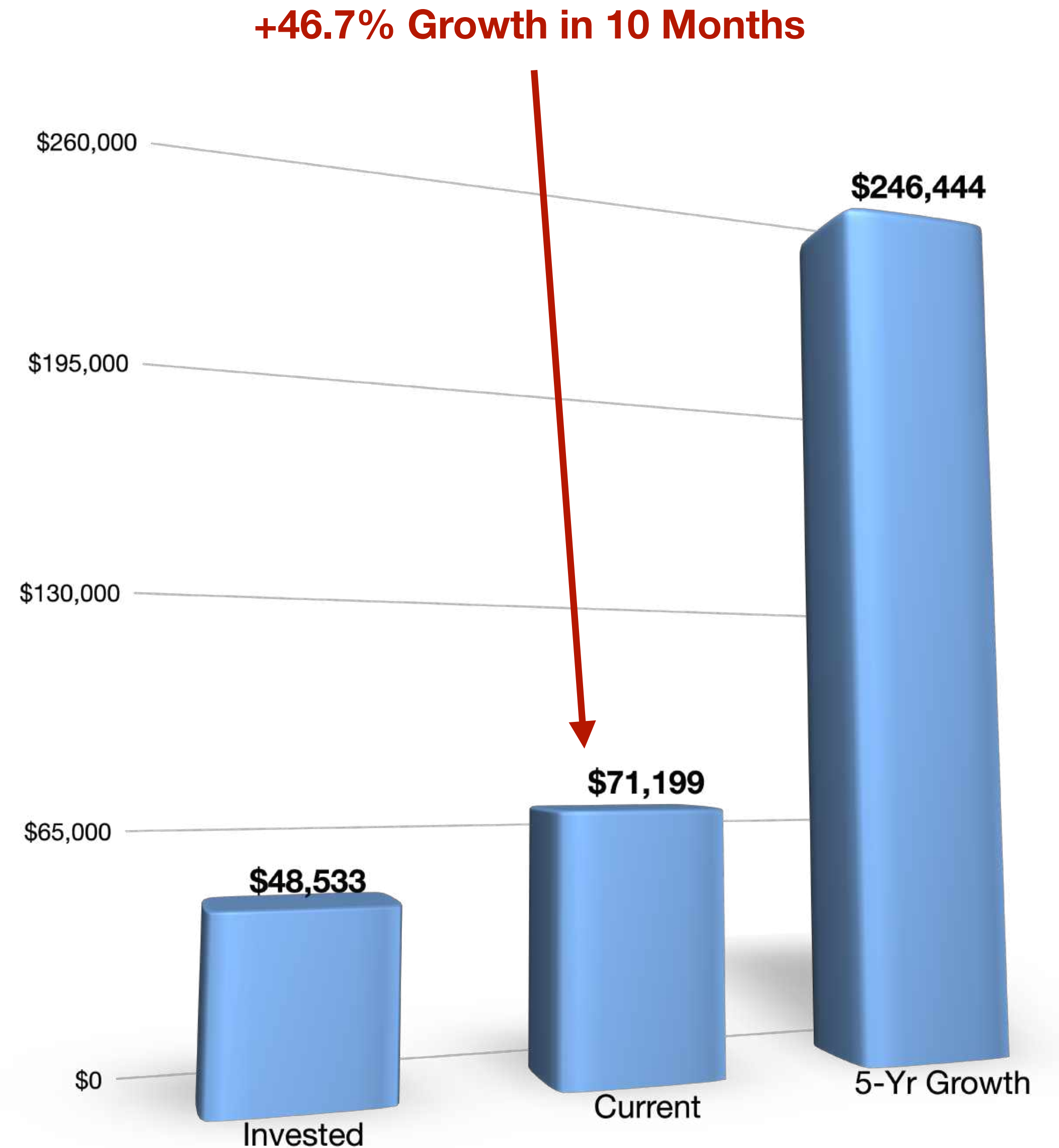
# Actual Performance of the Seven Sectors for 2023

Industry	Projection (Feb 2023)	Actual Performance YTD
Semiconductors (Mfg)	66.7%	99.9%
Semiconductors (E&M)	25.4%	62.3%
Information Technology	17.9%	15.1%
Software Application	30%	54%
Software Infrastructure	10.7%	53.6%
Internet Content	139.8%	65.6%
Electronic Gaming	50%	33.7%

# How Did I Choose These 20 Stocks?

Ticker	2/27/23	12/7/23	Shares	Capital	Value	Return
<b>Growth Stocks</b>						
ACIW	\$ 26.07	\$ 29.72	95	\$ 2,477	\$ 2,823	14.0%
ADBE	\$ 322.32	\$ 593	7	\$ 2,256	\$ 4,151	84.0%
AKAM	\$ 73.30	\$ 119.14	34	\$ 2,492	\$ 4,051	62.6%
ATEN	\$ 14.93	\$ 13.31	167	\$ 2,493	\$ 2,223	-10.8%
DBX	\$ 20.49	\$ 29.72	122	\$ 2,500	\$ 3,626	45.0%
DOX	\$ 92.61	\$ 85.69	26	\$ 2,408	\$ 2,228	-7.5%
FFIV	\$ 140.69	\$ 178.43	17	\$ 2,392	\$ 3,033	26.8%
FOUR	\$ 57.06	\$ 73.21	43	\$ 2,454	\$ 3,148	28.3%
FTNT	\$ 59.62	\$ 57.71	41	\$ 2,444	\$ 2,366	-3.2%
GDDY	\$ 76.00	\$ 105.66	32	\$ 2,432	\$ 3,381	39.0%
MSFT	\$ 250.16	\$ 369.27	9	\$ 2,251	\$ 3,323	47.6%
ORCL	\$ 87.96	\$ 103.29	28	\$ 2,463	\$ 2,892	17.4%
SNPS	\$ 363.36	\$ 558.03	6	\$ 2,180	\$ 3,348	53.6%
VMW/AVGO	\$ 110.96	\$ 1125.32	4	\$ 2,441	\$ 4,501	84.4%
VRSN	\$ 198.28	\$ 208.39	12	\$ 2,379	\$ 2,501	5.1%
				<b>\$ 36,062</b>	<b>\$ 47,596</b>	<b>32.0%</b>
<b>10x Stocks</b>						
APP	\$ 13.41	\$ 40.45	186	\$ 2,494	\$ 7,524	201.7%
AIP	\$ 6.57	\$ 5.82	380	\$ 2,497	\$ 2,212	-11.4%
QUIK	\$ 5.69	\$ 13.8	439	\$ 2,498	\$ 6,058	142.5%
ACMR	\$ 10.49	\$ 18.39	238	\$ 2,497	\$ 4,377	75.3%
AI	\$ 22.19	\$ 30.65	112	\$ 2,485	\$ 3,433	38.1%
				<b>\$ 12,471</b>	<b>\$ 23,603</b>	<b>89.3%</b>
				<b>\$ 48,533</b>	<b>\$ 71,199</b>	<b>46.7%</b>

## Investor's Blueprint Live: Feb 27, 2023



### Stock Analysis

Enter Data Needed Below	
Stock Symbol	
Current Price	18.20
Earnings (CY)	0.29
Growth Rate	85
200-Day MA	14
5-Yr Return	2041%

### Discount to Growth

Current Price	\$18.20
Earnings CY	\$0.29
Earnings NY	\$0.54
Current PE	62
Forward PE	33
Discount	-47%

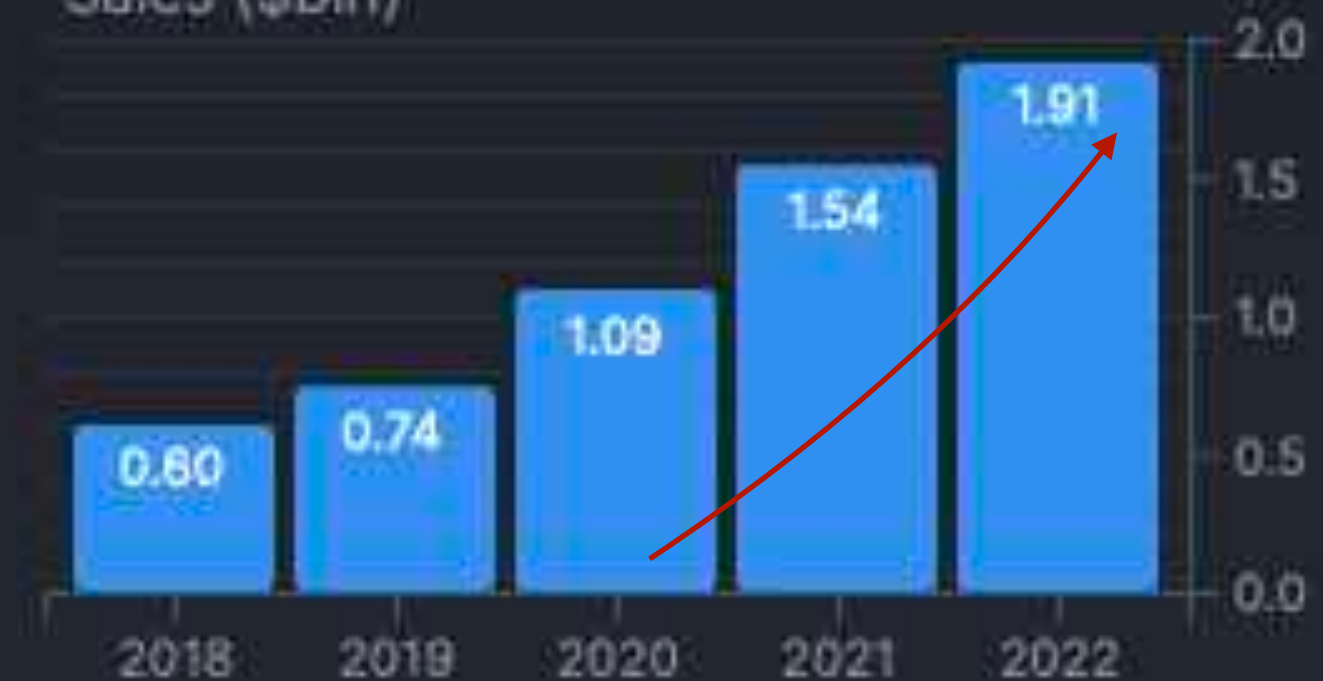
### Portfolio Assessment

Current Price		\$18.20
Price (5 Yr)		\$390
Portfolio Value		100,000
5% Allocation		\$5,000
Shares to Buy		274
200-Day MA		14
Max Risk \$		-\$1,151
% Risk Portfolio		-1.2%
Future Value		\$106,758
Gain (Proj)		2040.8%
Gain \$ Proj		\$101,771

EPS



Sales (\$bln)





# Investor's Blueprint 10th Annual Trading Conference

VIRTUAL OR IN PERSON: You Choose  
Hyatt Place Boca Raton, Florida  
February 8 - 11, 2024

**GOALS**  
1.  
2.

**ACTION**

**PLAN**

**NEW SKILLS**

# B Investor's Blueprint

## Agenda

Focus throughout the event:

- How to get more income
- How to find stocks (to get more income/growth)
- Every session will give you stock ideas
- Build a list of stocks by the time you leave the event
- Know the best tactics to use those stocks for growth or income

Thursday		
Time	Room 1	Speaker
10:00 AM	Income Madness (5 Stocks)	David Durham
10:45 AM	5K Challenge	Chris Davis
11:30 AM	Short-Duration Options	Dave/Jeff
Noon	30-Minute Lunch	
12:30 PM	Short-Duration Options	Dave/Jeff
1:00 PM	Trading for Income	Haley Bjorklund
1:45 PM	SPX 1-Day Trade	David Duham
2:15 PM	Using Think or Swim	Jeff Wood

Friday		
Time	Room 1	Speaker
9	Creating a Trading Plan (Pt 1)	John Hutchinson
9:30	3 Keys to Stock Selection (Live Trade)	David Durham
10:30	How to Get More Income	Haley Bjorklund
11:00	7-Day Income Trade (Live Trade)	Jeff Wood
11:45	How to Scan for Options Trades	Haley Bjorklund
12:30	The Monthly Cash Raid	David Durham
1:30	Dow 5 Income Strategy	Jeff Wood
2:15	Maximum Income Portfolio	David Durham

Saturday		
Time	Room 1	Speaker
9	How to Find Stocks	John Hutchinson
10:30	2024 Growth Portfolio	John Hutchinson
11:00	Creating a Trading Plan (Pt 2)	John Hutchinson
	Working Lunch	
1	Tracking and Portfolio Management	Haley Bjorklund
2	3-Stock Trading Strategy Review	Jeff Wood

# **B** Investor's **Blueprint**

## **Triple Bonus Announcement**

# Your Ticket Value Includes:

- **3-Stock Trading Strategy for 2024 (One Year FREE)**
- **Growth stock portfolio for 2024 (FREE BONUS)**
- **Monthly Top Stocks Analysis (FREE BONUS)**
  - (Webinar, Recording and Trade Exchange Updates)
- **Monthly Dividend Play (FREE BONUS)**
  - Dividend stocks paying 6% to 15% annual yields
- **Monthly Data and Economic Analysis**
- **Bonus workshops announced each quarter (3)**
- **Virtual Office Hours for all attendees**



Starting Balance: \$10,000  
69.6% Win Rate (23/33)  
Return on Capital: 73.4%  
S&P 500 Return YTD: 17.3%



# Last Chance for 50% VIP Discount

- Investor's Blueprint 2024: \$497 (Virtual or Live attendance)
- Price rises to \$997 on January 2, 2024
- Next 3-Stock Strategy released on 12/29/23
- Plus, bonus webinar of 3-Stock Strategy on 12/28 4pm Eastern Time
- Bonus Dow 5 trades (2 released today; more planned for January)
- Includes all bonus for 2024 (only)
- This is **NOT A SUBSCRIPTION OR RECURRING CHARGE**

