

Concepts Introduced

Description

Using our 15Minute Market Update curriculum format, we teach important concepts of global finance, business economics, and common stock investing principles “ while clarifying what is happening in the markets today. These are introduced in a manner that is easily read within 10 to 15 minutes, using any internet device. Our users range in age from early teens to the 90s™s.

Our purpose is to use the dynamic nature of the global markets to introduce current concepts of finance, business management, product development, marketing, government policy, supply and demand, etc from the perspective of a wise investor.

In the table below are a few exciting examples of some of the many concepts that we have introduced over the last year, in a company or case study format. Here you can see the investment opportunity that was identified along with the concept or case study and the investment return achieved.

In order to anchor the significance of a concept of subject introduced, we look for directly related or tangential investment opportunities. Learning becomes exciting with our program and our results are impressive “

Concept Introduced	Company or Event Case Study	Investment Opportunity
Characteristics of Excellence in Companies and their CEO™s	Apple, Inc. , Ford Motor Co., Dell, Inc., etc others	Ford (+93%); Apple Inc. (+24%); Dell (+6%)
Global Finance	European sovereign debt, Inflation, U.S. bond sales	Bank of Ireland (+20%)
Companies poorly managed, but possibly turning around (Understanding what happened and what has now changed)	YRC Worldwide; Hewlett Packard;	YRC Worldwide (+104%); Hewlett Packard (+/- 0)
Development Stage Pharmaceutical Co.™s “ FDA Approval Process	Dendreon, Inc. ; Arena Pharmaceuticals; Amarin etc	Dendreon (+13%); Arena (+94%); Somaxon (-15.9%)
Function of the U.S. Federal Reserve	Quantitative easing II	Market rally starting Sept. 2010 + Peak on May 2, 2011
What influences company earnings; Earnings expansion	Zagg, Inc.; Sodastream International.; Apple Inc.	Zagg, Inc. (+6.7%)

Initial Public Offerings (IPOs) and the Importance of Price Discovery	Linked-In, Renren	None. Learn the importance of price discovery, before investing.
Job creation and importance for stimulating job growth vs. poor government policy.	Mr. Andy Grove " Former CEO and Chairman, Intel Corporation. Creating Jobs in America	None. Learn the different ideas of creating jobs in America.
Bubble behavior in commodities and possibilities of shorting in a traditional brokerage account.	Silver in late April / early May 2011	Shorted silver (+26%)
"Rare-earth" concepts and foreign owned corporations in far-off places " What to look out for.	China Zhen Zhou Mining (SHZ)	Opportunity came +54% on SHZ " In two days. Learn importance of taking profits quickly.
Importance of setting and enforcing "stop" orders	Research in Motion (RIMM)	RIMM (-3.9%); Cisco (-9.4%)
Banks and Reserve Ratios	Bank of America (BAC)	BAC (+6%)
Balance Sheet Basics	Apple, Inc.+ Others.	See above.
New Products	Green Mountain Coffee Co., ZAGG, Inc., Apple, Inc., Motorola, SodaStream International	ZAGG (+6.7%); Apple (+4.8%);
Characteristics of key reversal days	Overall market.	Short in silver (above); exit of long positions.
"Game Changers" or Paradigm Shifts	eBay development of Paypal as a viable alternative to Visa and MasterCard " in combination with smart phone adoption.	Watching eBay.
Insider purchases or sales	Simple Tech " CEO unloads all of shares AND there is a secondary offering!	STEC (+62%)
Importance of being able to accept being wrong and cutting losses quickly.	Ford, Cisco, Research in Motion	Ford (-4.2%); Cisco (+3.3% and -9.4% on 1/4 position); RIMM (-3.9% on "toe-in")
Leadership Succession Planning	Apple, Inc.	Apple (+5%)

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