**POST ANALYSIS GUIDE** Re-issued 1/2023

***STOCK CHECKLIST***

**Maintain a Trading Log**Every Trade, Print out a Daily and Weekly chart. Mark the following on the chart:

* + Your reason for the trade
	+ Arrow with buy and sell date
	+ Number of shares
	+ Price per share
	+ Total amount invested
	+ Average cost
	+ Percent gain/loss on the current position
	+ Condition of the General Market (# distribution days)
	+ Mark in blue the positive feature of the fundamentals/technical on chart
	+ Mark in red the positive feature of the fundamentals/technical on chart

**Organize your Trades**Every 3-6 months, organize your trade into from largest percent gainers and largest percent losers. Ask yourself the following questions:

* + Did I evaluate the entire CAN SLIM criteria *before* buying?
	+ Which CAN SLIM criteria were less than ideal?
	+ Did I have too much exposure to volatile thin stocks (>300,000sh/day)?
	+ Did I evaluate the technical factors before I bought or sold?
	+ Did I chase beyond a proper buy point?
	+ Did I trade in the general direction of the market?
	+ Did I pay attention to follow-thru day that occurred in the market?
	+ Did I pay attention to distribution days that occurred in the market?

**Organize your Trades Continued:**

* + Did I pyramid properly?
	+ Did I add to positions at low risk entry points?
	+ Did I calculate my average cost before making ‘add-on’ buys
	+ Did I set a price objective?
	+ Did a “tip, rumor, news” influence my decision?
	+ Did I catch the sell signals that indicated a climax, top, signs of weakness or possible change of trend
	+ Did I limit my losses to a maximum of -7%?
	+ What was my loss as a percent of my total equity? Rule of thumb should be no more than 1.25%
	+ Was there emotion element influencing this trade that prevented me from being objective and disciplined?
		- Was I impatient…got to make money now!
		- Fear of being wrong; afraid to take another loss?
		- Did I freeze up and not act?
		- Ego: I know I am right – it will come back
		- Greed: Everyone else is making money, so will I
		- Overconfidence: Larger positions after a successful trade
		- Overtrading: Addicted to the excitement of trading

**Where are they now?**

* + Examine every stock you bought/sold and see where they are now. Identify those stocks that made big moves without you on board.
	+ You must study these examples to determine why you sold these winning stocks.

**Identify Themes and Create Rules**

* + Look for repeat mistakes and review the lost opportunities. Formulate new rules to prevent repeating the same mistakes in the future. Limit this to one page max.
	+ Ask yourself, if I had followed CAN SLIM rules, how much money would I have made or saved last year

***PORTFOLIO CHECKLIST***

* + Stocks weighting as percentage of portfolio equity

		- How many positions? Max position size?
		Was I overweighted or underweighted and why?
		Percent of portfolio invested? Plot on Indexes @end of month
	+ Batting Average for the year
		- Average Gain
		- Average Loss
	+ Do I have the Leaders in my portfolio?
		- Is this stock the real leader in the Group?
		- Is this stock the real leader in the whole market?
	+ Have I created a Winning Trading Plan based on my stats?
	+ Have I reviewed a Distribution Curve of wins/losses percentages?
	+ Have I reviewed my Entry-Exit Report Card?
	+ Loss Adjustment Exercise
		- Move all big losses to -8% max. What effect did this have on portfolio return?