**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?