

A hand holding a compass over a map, symbolizing navigation and direction. The background is a blurred map with various lines and colors, suggesting a complex terrain or data set. The hand is wearing a green long-sleeved shirt.

# Technical Analysis with StockCharts.com

Investment decision-making tools

David Toms

Presentation to OLLI Investment Forum

March 1, 2023

# \$25 per month

\$15 and \$40 plans also available





## Provides:

- **50+ technical analysis tools**
- **Portfolio tracking without personal holdings**
- **Watchlist tracking**
- **Wide assortment of technical tools**
  - **Point and Figure charts**
- **Alerts on specific stocks**
- **Some analysis of earnings, cash flow, growth**
- **Market scans**
- **Daily and weekly updates with expert commentary**
- **Tutorials, both video and narratives, on how to use the tools**
  - **Chart School**
  - **Market analyses and commentary**
- **Covers stocks, bonds, commodities, domestic and international markets**
- **Many contributing analysts, bloggers**












# Chart School resources

## Scans & Alerts






### Overview

<b>Overview</b>	
A diverse collection of educational investing articles	
<b>Chart Analysis</b>	
The methods used to analyze financial charts	
<b>Technical Indicators &amp; Overlays</b>	
Descriptions and formulas for our technical indicators	
<b>Market Indicators</b>	
Descriptions and formulas for our broad market indicators	
<b>Market Analysis</b>	
Articles about the many different types of market analysis	
<b>Glossary</b>	
Helpful definitions for common financial terminology	
<b>Trading Strategies &amp; Models</b>	
Info about technical trading strategies and systems	
<b>Index &amp; Market Indicator Catalog</b>	
Documentation for the index symbols we provide	




### Chart Types and Views

<b>SharpCharts</b>	
Our original, award-winning financial charting tool	
<b>StockChartsACP</b>	
Our full-screen, interactive Advanced Charting Platform	
<b>ChartNotes</b>	
Learn more about our annotation tool for SharpCharts	
<b>P&amp;F Charts Workbench</b>	
Learn how to use our Point & Figure charting tool	
<b>Interactive PerfCharts</b>	
Dynamically compare the performance of multiple symbols on one chart	
<b>CandleGance Charts</b>	
Mini-charts displayed side-by-side to show multiple symbols at once	
<b>Seasonality Charts</b>	
Chart a security's monthly price performance trends over time	
<b>GalleryView</b>	
See a symbol in multiple time-frames all on one page	
<b>MarketCarpets</b>	
Scan large groups of securities for emerging trends and technical moves	
<b>RRG Charts</b>	
Visualize relative strength and momentum for a specific group of securities	
<b>Dynamic Yield Curve</b>	
An interactive yield curve showing the relationship between rates and stocks	







### Technical Scans

<b>Overview of Technical Scans</b>	
Get a sense of what you can do with technical scans on StockCharts	
<b>Advanced Scan Workbench</b>	
Create custom technical scans for your unique criteria	
<b>Scan Syntax Reference</b>	
Find helpful scan starters and snippets	
<b>Advanced Scan Library</b>	
A collection of advanced scans for you to use or start from	
<b>Scanning Tutorials</b>	
Get a sense of what you can do with technical scans on StockCharts	

### Technical Alerts

<b>Overview of Technical Alerts</b>	
Get a sense of how you can use our technical alerts	
<b>Technical Alert Workbench</b>	
Learn how to create your own custom technical alerts	
<b>Alert Center</b>	
See a summary of all your alerts in one place	

### Educational

<b>StockCharts Blogs</b>	
Expert market commentary by top technical analysts	
<b>Instructional Videos</b>	
Videos to help you get the most out of StockCharts.com	
<b>The ChartWatchers Newsletter</b>	
Our free twice-monthly email newsletter	
<b>The StockCharts Store</b>	
Hundreds of top-selling investment books, DVDs and more	
<b>Public ChartLists</b>	
View charts from other StockCharts Members	
<b>StockCharts Answer Network (S.C.A.N.)</b>	
Our user-to-user help site and online network	

# Splash Page

David ▾

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[Your Dashboard](#)

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[Help](#)

David Toms
Extra Member

### Member Tools

Scroll for more

- Your ChartLists**  
Review your saved charts
- Advanced Scan Workbench**  
Create custom technical scans
- Scheduled Scans**  
Set your scans to run automatically
- Technical Alert Workbench**  
Set custom technical alerts
- Your Alerts**  
View and manage your custom alerts
- User-Defined Indexes**  
Create your own personal indexes
- Public ChartLists**

### Market Overview

US Market: **OPEN**

EQUITIES BONDS COMMODITIES CRYPTO

Index	Price	Change	% Change
Dow	32995.89	+178.97	+0.55%
S&P 500	3997.90	+27.86	+0.70%
NASDAQ	11514.86	+119.92	+1.05%
NYSE	15546.83	+82.37	+0.53%
TSX	20311.74	+92.55	+0.46%
S&P 600 (Small Cap)	1254.20	+6.48	+0.52%
S&P 400 (Mid Cap)	2615.59	+14.91	+0.57%
S&P 100	1789.99	+13.58	+0.76%
NASDAQ 100	12111.49	+141.84	+1.18%
\$VIX	20.91	-0.76	-3.51%

Market Summary

### Sector Summary

CandleGance | PerfChart | RRG

NAME	SYM	CLOSE	CHG	% CHG	
Consumer Discretionary	XLY	146.01	2.15	1.49	■
Industrial	XLI	101.49	1.18	1.18	■
Technology	XLK	137.52	1.43	1.05	■
Materials	XLB	81.92	0.73	0.90	■
Communication Services	XLC	53.58	0.34	0.64	■
Financial	XLF	35.81	0.15	0.43	■
Real Estate	XLRE	38.26	0.13	0.34	■
Energy	XLE	84.91	0.25	0.30	■
Health Care	XLV	128.76	0.25	0.19	■
Consumer Staples	XLP	72.79	0.08	0.11	■
Utilities	XLU	66.56	-0.05	-0.08	■

Sector Summary

### Your Scans

Scans In Use: 3 of 200

Select a Saved Scan

-- Select a Scan--

### Your Alerts

Instructions

ALERT	LAST ALERT
APD Bullish MACD alert	27 Feb 2023, 9:38am
CRSP Buy signal	27 Feb 2023, 9:33am
CMI bearish MACD	22 Feb 2023, 2:43pm
MPW bearish MACD	22 Feb 2023, 9:33am
STEM Bearish MACD	22 Feb 2023, 9:33am

1 2 3 4 5 6 7

# Single stock display



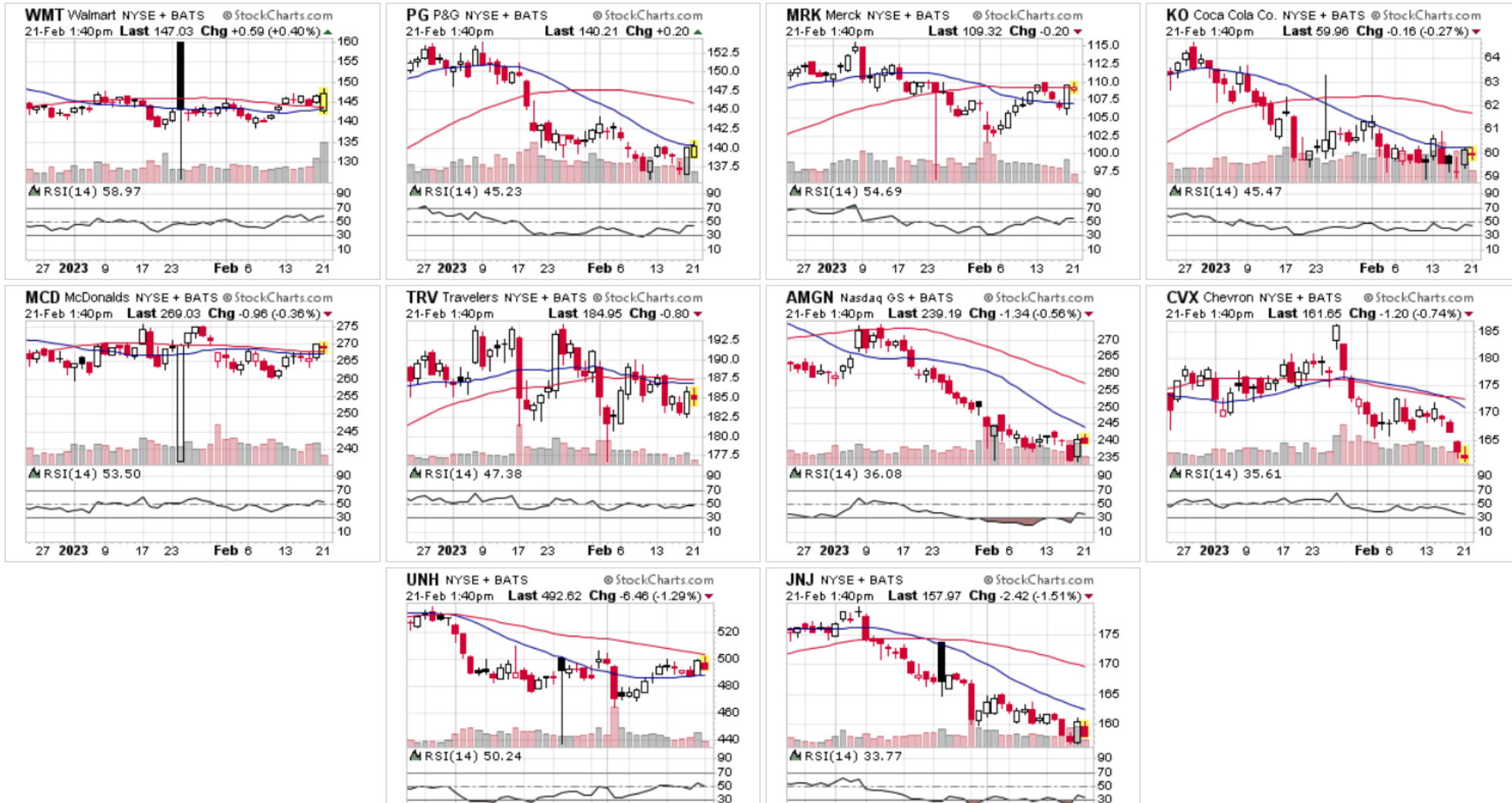
Relative Strength Index

Candlestick

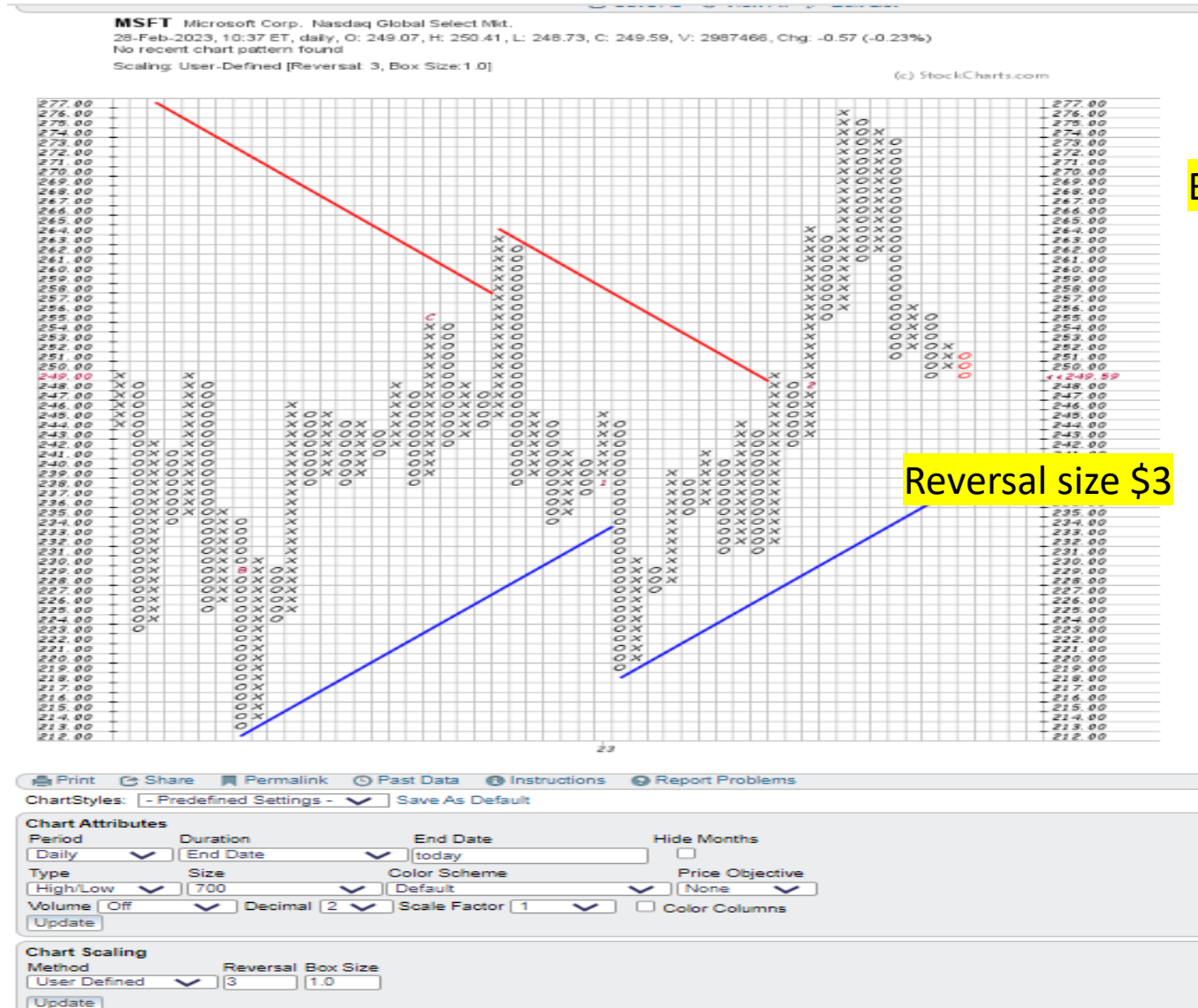
Moving Average Convergence / Divergence

# Candle Glance display

StockCharts Members: Customize your CandleGlance charts! [Learn How](#) ↗




# Point and Figure charting



Box size \$1

Reversal size \$3

# Options Chain

 NASDAQ | Technology | Computer Hardware

## Apple, Inc. (AAPL)

LAST (27 FEB, 12:54 PM ET)

**148.32**

**+1.61 (+1.10%)**

MARKET CAP

**2.346 T**

VOLUME

**21,747,321**

### MEMBER ACTIONS

 Add to ChartList

 Create Alert

 List View  **Straddle View**

EXPIRATION

Friday, March 3, 2023

In The Money

### Calls

Friday, March 3, 2023

### Puts

LAST	CHG	% CHG	VOLUME	OPEN INTEREST	IV %	STRIKE	LAST	CHG	% CHG	VOLUME	OPEN INTEREST
98.35	-4.45	-4.33%	23	15	24.86	50.00	0.00	0.00	-	-	-
88.55	0.00	-	1	-	24.86	55.00	0.00	0.00	-	-	-
87.80	0.00	-	2	-	24.86	60.00	0.00	0.00	-	-	-
84.55	0.00	-	3	12	24.86	65.00	0.00	0.00	-	-	-
79.05	0.00	-	18	18	24.86	70.00	0.02	0.00	-	5	251
0.00	0.00	-	-	-	24.86	75.00	0.01	0.00	-	277	524



# Microsoft summary page

## Microsoft Corp. (MSFT)

LAST (27 FEB, 1:15 PM ET)

**251.08**

+1.86 (+0.75%)

MARKET CAP

**1.868 T**

VOLUME

**10,054,132**

Enter Symbol or Name

Go

### MEMBER ACTIONS

+ Add to ChartList

🔔 Create Alert

Summary Fundamentals Technicals SCTR Profile Scans Alerts ChartLists Options

2D 5D 1M 6M 1Y 5Y

Advanced Chart



### Summary

as of: 27 Feb, 1:15 PM ET

OPEN	252.46
PREVIOUS CLOSE	249.22
DAY RANGE	249.52 - 252.82
52-WEEK RANGE	212.30 - 312.88
ALL-TIME HIGH	345.56
AVG. VOLUME (50-DAY)	32,264,606
EPS (TTM)	8.99
NEXT EARNINGS DATE	04/25/2023 (AMC)
LAST EARNINGS DATE	01/24/2023
FORWARD ANNUAL DIVIDEND (YIELD)	2.72 (1.08%)
TRAILING ANNUAL DIVIDEND (YIELD)	2.60 (1.04%)
OPTIONS	Yes

# SCTR – StockCharts' Technical Rank

## Long-Term Indicators (weighting)

- \* Percent above/below 200-day EMA (30%)
- \* 125-Day Rate-of-Change (30%)

## Medium-Term Indicators (weighting)

- \* Percent above/below 50-day EMA (15%)
- \* 20-day Rate-of-Change (15%)

## Short-Term Indicators (weighting)

- \* 3-day slope of PPO(12,26,9) Histogram/3 (5%)
- \* 14-day RSI (5%)

# Microsoft summary cont'd

## Fundamentals

P/E RATIO	27.71
PEG RATIO	-5.80
PRICE TO BOOK	10.13
PRICE TO CASH FLOW	21.24
PRICE TO FREE CASH FLOW	44.08
TOTAL SALES (TTM)	204.094 B
REVENUE PER SHARE (TTM)	27.31
SHARES OUTSTANDING	7,443.8 M
SHARE FLOAT (%)	7,330.86 M (98.48%)
% HELD BY INSTITUTIONS	72.48
DIVIDENDS PER SHARE (TTM)	2.60
EX-DIVIDEND DATE	02/15/2023

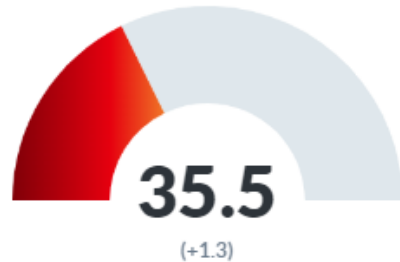
## Technical

+/- EMA(20)	255.15 (-1.60%)
+/- SMA(50)	246.25 (+1.96%)
+/- SMA(200)	251.51 (-0.17%)
5-DAY PERF.	-2.70%
1-MONTH PERF.	+1.43%
3-MONTH PERF.	+1.70%
6-MONTH PERF.	-5.85%
YTD PERF.	+4.96%
1-YEAR PERF.	-14.72%
RSI(14)	47.37
ATR(14)	6.68
ADX(14)	17.60
BETA(5Y)	1.21

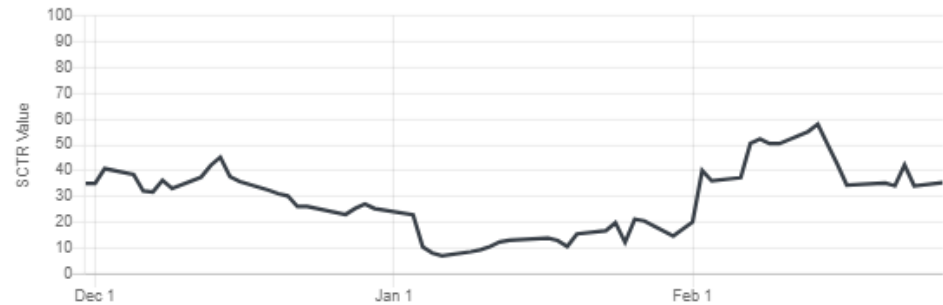
## SCTR Rank

[SCTR Reports](#)

### MSFT



SCTR Universe: Large Cap



[Click Here](#) for more info about the StockCharts Technical Rankings (SCTRs)

## Earnings

EARNINGS HISTORY COMING SOON

## Analyst Ratings

ANALYST RATINGS COMING SOON

# What You Don't Get

- No direct trading links
- No portfolio analysis or valuation
- No dividend analysis
- No total return analysis
- No short activity
- Scant coverage of bonds, CDs, commodities
- No discussion of company quality, competitiveness, comparisons

# Summary

- \$25 per month is a good value, BUT
- I would never make an investment decision based solely on TA
- My investment buy decisions are based on many criteria
  - Company quality, competitive moat
  - Corporate strategy, products, industry position
  - Dividend sustainability
  - Income statements, cash flow, balance sheet parameters
  - Analyst coverage
  - Ownership
- StockCharts helps me with sell decisions

Unintended consequence: Am I turning into a day trader?