

Portfolio Guide





PORTFOLIO GUIDE

By Steve Fernandez & Ian King, Editors of *Profit Point Alert*

Welcome to our *Profit Point Alert* portfolio walkthrough.

Here you'll learn everything about our model [portfolio](#) — how to navigate and utilize it.

Each month, you'll get one to three stocks recommendations.

After each recommendation goes through my *Profit Point* trading strategy process, we send you a detailed trade alert analysis. And the following trading day, it is added to our model portfolio.

PROFIT POINT ALERT				
Positions: 8 Average Hold: 59 Days Average Gain: -29.01%				
Last Update: June 6, 2022				
Select Portfolio				
Open Positions (8) Blotech (4) Non-Biotech (4)				
SYMBOL	OPEN	CURRENT	RETURN	BUY-UP-TO
MNDY Monday.com	\$106.40 05/16/2022	\$114.50	7.61%	\$130
PDYPY Flutter Entertainment	\$57.09 04/01/2022	\$57.81	1.25%	\$65
ATHA Athira Pharma	\$13.20 04/01/2022	\$9.18	-30.45%	\$15
ALDX Aldeyra Therapeutics	\$4.82 04/08/2022	\$3.16	-34.44%	\$5.5

If you're new to Banyan Hill, I encourage you to take a moment to read through our tips and tricks for using the portfolio.

Navigating the Portfolio

Let's start with a few pointers on how to operate the online portfolio itself.

- **Categories:** We organize the stocks into categories. The first category, "Open Positions," has all our current recommended investments.

If you want to look at stocks in a specific sector, click on the sector's tab at the top of the portfolio. All of our open positions in that sector will show.

The "Past Positions" category will have all our sold recommendations and their returns.



- **Sorting:** You can sort the portfolio by any category. Simply click the "Symbol" tab to sort by stock and "Open" to sort by the date we entered the stock, etc.



- **Links:** If you want to see the original trade recommendation, the dates are hyperlinked for easy reference.

Simply click on any open date, and it will take you directly to the trade or report.



Simply click that date, and it will open the trade alert.

- **Prices:** The portfolio will update prices automatically when you open it. It uses the most recent prices listed in the "Current" column.
- **Print:** You will notice above the portfolio has a printer icon. If you wish to print the portfolio, simply click that icon, and it will open our entire portfolio in a new window.

At that point, you're ready to print. You can right-click on your mouse, then select "Print" from the drop-down menu.

Overview

Now that you know how to navigate the portfolio, let's go over what each column and section means.

- **Blue Bar:** In the blue-shaded box at the top, you can see the portfolio at a glance. This information includes the number of open positions, the average gain and our average holding period.
- **Symbol:** This is the name of each recommended investment and its ticker symbol.
- **Open:** This is price we paid upon entry. We typically use the closing price of the day we

entered the investment, so your buy price may differ from ours. This is fine, as everyone's purchase price will likely be a bit different.

The date we entered the position is also under the price.

- **Current:** This is the most recent price of the investment.
- **Return:** This is our return (or loss) on a position.
- **Buy-Up-To:** Here we'll tell you the maximum price we recommend you pay for the investment. If a stock is in this price range, you can buy it or add more to your position. If you ever see "Hold" in this column, we recommend not buying the stock at the moment.

That covers our brief portfolio walkthrough. Thanks for following along. I hope this guide helped answer any questions you had about how to follow our positions, so you're completely comfortable making our trades.

And remember, for up-to-date stock news, tune in to our weekly webinars every Tuesday in your inbox.

But if you have any more questions, contact our team at ProfitPoint@BanyanHill.com.

Regards,



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