*Doc Eifrig:* All right. This next person started our company in 2015. Keith Kaplan is one of my favorite people, but really because we discovered early on, well, he discovered early on that I was serious about him caring when he was at work. If you're enthusiastic and caring and you're around me, I don't care if you mess up at all. I don't care what you do. And Keith cared.

But what I really loved about Keith is we had a mutual joy and respect and regular listening to Earl Nightingale and Brian Tracy. And if any of that stuff from way back, the sort of self-help psychology stuff. Anyway, he gave me, gosh, I think it was a 40-hour tape set, not tape, but CD. But anyway, I love Keith and how he thinks.

So first of all, how many people here have used TradeSmith? Raise your hand for me, please. Oh, that's fantastic. Okay. So I don't have to say much, but for those of you that don't know TradeSmith or Keith, he's the CEO of TradeSmith. And I would describe him as a champion of the retail investor.

Keith has invested and traded many different markets, Bull and Bear over the last 25 years. And like many investors, he suffered highs and lows, and he'll admit that. He joined our company after years of frustration with lack of available tools and financial literacy. And using his 25 years of software architect experience and his belief in unleashing the power of software and empowering the individual, the everyday retail investor, he joined trade TradeSmith.

He started with TradeStops. That's a simple program to track fixed percentage trailing stops. And since that time trade, TradeSmith has expanded to its mission to provide individual investors with sophisticated and easy-to-use tools to help them make better decisions. You all this, stocks, cryptocurrencies, everything.

His mission is really about bringing the power of investing, mixing it with trading software and his core philosophy to the general public, so that they can be successful investors. And I know many of you have heard stories, we've seen it how successful this is. So please welcome, give a big round of hand and thanks to Keith Kaplan, please.

*Keith Kaplan:* Thanks Doc. Hello, it's so great to be here. I'm Keith Kaplan as Doc said. I'm the CEO of TradeSmith. We have over 50,000 investors tracking more than $30 billion of real assets right in our platform. Over half the people here and on the live stream are already customers of ours. Thank you so much for that trust that you've put into us. It's a true honor to serve you.

So let's hop in. Let's talk about the global markets. They are extremely healthy today, which is really good for us as investors. What you're looking at is a screenshot from our platform. It's looking at the 12 major indexes around the world. It's telling you how healthy they are. That's the green box, and it's even showing you that China's having a little bit of trouble. But what's really cool about this is that health distribution. What we're looking at here are the underlying components of each index around the world.

We can measure health in these indexes based on these underlying components. So the top one is the S&P 500. The S&P 500 as you know, is made up of 500 large cap companies. Each one of those companies is tracked as a component inside that index. And we see how healthy it is or how unhealthy it is if they're red. This is important as an investor because you can see the trends over time.

I built this about three years ago because I was frustrated with Yahoo finance and just looking at stock charts or index charts and not having any idea if I should be buying or selling. So if I drill down further into the S&P 500, I'll tell you that it looks fantastic today. We can see over a period of three years, there were days when we had a lot of red components, a lot of red stocks, unhealthy stocks in the S&P 500.

And as that transferred to green components, we were getting healthy. That's a good bullish trend for us. And if I take a little bit of a step back and look about nine, ten years of history, you can see these periods of time in the S&P 500, where we would see these big seas of red. It would go to green, red, green, but you see how violent things have gotten since the end of 2018, all the way into 2020, and it tails off into 2021. We've got a very, very healthy market right now. You might be thinking this is a sign of a top. Well, I don't think so. I think the market can run much further from here. And I can tell you that it is extremely healthy today, and you should be invested.

About five weeks ago, I stood on a stage similar to this in Colorado giving a presentation. And I told them the same thing. The market was super healthy. But the difference was back then, the fear and greed index was all the way down at a 20. People were extremely fearful. So I told them, this is the perfect time to be invested in the markets.

Right now it's greedy. We're at a 67. But as you can see over time, we're nowhere near the greed level that we were going into 2020. And of course, we're nowhere near the fear level, even five weeks ago as we were during the pandemic. So if I take a back and I look at the global markets back on February 27th of 2020, this is about 18 months ago. This was a really big day for us. I'll tell you why in a moment. But most of them were red, and all of the underlying components were not doing well. And our system was showing this, even though we were only six percent off of a recent high.

So the markets were down about six percent at this time. And most people were thinking, we don't really know what's gonna happen. This is well before lockdowns. This is before travel shutdown. I think we only had a couple cases of COVID at the time within the United States at least. And so I was looking at this and I was thinking, this isn't good. We are not trending in the right direction.

And I'll tell you I was starting to panic, and then that night we got the big bear market warning that our system issued. And it was based on how fast the markets were breaking down and how unhealthy they truly were underneath those components. They were getting so unhealthy. So we sent out the signal and the next day I sold pretty much all of my stocks. It was about 97 percent in cash when I sold my stocks.

I held onto two stocks, and I'll be honest, I regretted it. But also what happened was I was able to get back into markets on March 27th when that sea of red started to turn green. When we started to see health. This was at a point when most people were so fearful, they were dumping their stocks. And I was picking 'em up and buying 'em because of the system.

Before the system, I could have never done that on my own. Totally emotional investor, had no idea what I was doing, but I just kept trying to do it. I would buy high and sell low. This system has helped me reverse course. But after that, came all of the real trouble. We had the fastest bear market in history. We tripped circuit breakers more often than we ever had in the past. We had days where the market was up ten percent, down, ten percent.

Every day felt like a new record for one reason or another. Guns and ammo were sold out. Supply was starting to dwindle. Oil went negative. I remember thinking to myself, if oil's negative, that means somebody will pay me to take a barrel of oil. What can I do with that barrel of oil? But then I realized it was too heavy, I probably couldn't carry it, so I moved on.

But when you went to buy toilet paper, toilet paper was out, paper towels were out. Supply was dwindling. You couldn't get meat. I couldn't get my favorite bacon. Unemployment had skyrocketed in what felt like overnight. Some people were saying this was gonna be like the great depression, but other people were saying, to expect a V-shaped recovery. As an investor, I was just listening to our system, ignoring all of the noise, and making sure that I was successful with what I was doing with my investments.

But at the same time, I was freaking out, not because of the stock market. At this point, I already reinvested in the stock market. I had this house that we had a contract on, that we were supposed to move into on August 15th of 2020. And at the end of March, I see this chart about the housing market. I remember December of '18 being one of the worst months for stocks since the great depression.

So I thought to myself, if the housing market declined as much as it did in December, and it was truly hot going into 2020, more hot than it had been in a while. And seasonality wise, people don't really like to buy houses in the middle of winter, at least where we're from. And then I saw after COVID hit that the housing market was plummeting.

So I freaked out. I called our realtor, and against my wife's best wishes, I said, I would rather be homeless and sell this thing than to be stuck carrying two homes for a period of time. The original plan was to wait till June, July to sell our current house because we knew it was in great shape, and the market I thought was doing really well at the time.

So I panicked, sold our home in early May. We put it on the market on a Monday, by the time I went to sleep, we had six incredible offers above asking. We didn't even take the best offer. We took the offer where if people wrote us a letter telling us why their jobs were gonna be secured during COVID. I thought this was the best thing I could do.

So we ended up homeless for a couple of months. We moved into this Marriott Residence Inn, we spent at least a month there. And I thought, my wife, I knew she was already mad. She already felt like she was right, and I was trying to do everything possible to disguise how bad I had just done for our family. So I cooked chili that first night.

And if you've ever been in a residence inn you'd know that it has a couple bedrooms and it has a nice little kitchen. And I make chili because it's my family's favorite meal and I'm really good at it. But what I didn't know was gonna happen was over that month, every single time we walked into a hotel room, it would smell like chili. So there was no ventilation. And I had to be reminded every single day of my problem. So I just wanted to let everybody know that women are always, always right.

And the housing market is still doing fantastic. And I'm minded of that constantly when we get these reports from Redfin talking about how much our old house has appreciated more so in one year than it had in 20 years prior, which is just amazing. Housing supply is low, but housing prices are up. Interest rates, believe it or not, are at the lowest point in 5,000 years. Who knew that we were tracking interest rates in 3000 BC?

I had to look this up in many different ways because it just doesn't make sense to me that you would attract interest rates all the way back in 3000 BC. But the point is that interest rates are at an all time low, housing markets up. The stock market has hit an all time high again in the S&P 500. Things are looking really healthy. And the same health that we give to the components in the major indexes around the world, we also do for sectors and commodities.

So if I look at sectors, I can see that there's a couple sectors that are on fire. They're the healthiest they have ever been in history. It doesn't mean that they're gonna keep going up, but we would expect that this type of health and momentum will carry at least into the near term.

So you can be looking at energy financials and real estate as great sectors to be in, but all of 'em are doing really, really well right now. So you're probably thinking to yourself, okay, I've got some mixed feelings right now. I've been at this conference. I've probably heard 20 different stock ideas. Where should I put my money?

So let me show you where I would start if I was you. Stansberry Research is a rich source of investment ideas. Some of the best analysts from Hedge funds, Walls Street, everywhere around the world in the financial world are here at Stansberry Research.

The research is incredible, but what do you do with all of that? I would tell you, you should build the perfect portfolio. This is a screenshot of the result of running the pure quant portfolio builder inside of our system. Half of you probably have access to that, and I hope you use it a lot. You can use this to buy any amount of stocks, and you can use it to find these sources of ideas and how to put them to work in the best way possible.

I call this the perfect portfolio because it does things really, really well. Number one, you tell it where you wanna point to, to get your source of stocks, I pick Stansberry Research because they have great analysts with great track records. So I have a good source of stocks. But then what it does is it finds the healthiest stocks of the source that I picked and it also makes sure that they're in an uptrend.

Being in an uptrend is so critical because momentum is our best friend. It's the number one indicator of future returns for the stock market in all of the tests that have ever been run on every type of factor that you can explore within stocks. So these stocks are healthy, they're in an uptrend. It also normalizes the risk across your whole portfolio.

I would say, if you take one thing away today, having equal weighted position sizing cross your portfolio has never been more important than right now, because you don't wanna create yourself an unmanageable loss if things go bad. You don't wanna be too overweight in one position compared to another. And I'll explain that a little bit more.

But the last thing it does is it does what's called a performance diversificatio'sn. And so it looking at all the stocks in the source. And Stansberry probably had about 300 stocks that this tool was looking at. It looks at all of those, and it says, I wanna take the stocks that move differently from each other, because if one part of the market goes down, I don't want my entire portfolio to go down.

I wanna find stocks that don't behave the same way. And it's almost like the cherry on top when building a portfolio. Again, you can build a basket of stocks, you can get two stocks from this, you can get 20 stocks, however many you want. And there's three steps to building this perfect portfolio, and it takes about a minute to run, even if you're brand new to this.

The first step is you pick your source. Inside the sources, we have a whole bunch of different ways you can bring stocks in here. You can just put the whole stock market in here if you want, and this tool will find all of the best stocks for you. By the way, if you're trying to write this down, you can go to our booth or you can contact us and we will gladly give you a screenshot of that portfolio as well.

So what I did here was I just picked Stansberry, but I could have picked this billionaires thing that's right above Stansberry. We have 27 billionaires in our system today. We are tracking nearly 2000 stocks of the world's greatest investors in our system, and you can get access to all of that. So you can put the whole market in here. You can put any newsletter you follow. I chose Stansberry Research.

You can also customize what it's looking at to determine what stocks it should bring back. Maybe you just wanna invest in small caps right now. You can do that. Maybe you don't wanna invest in healthy stocks, you wanna find the stocks that might have a big turnaround, come off the bottom and go up. You can pick red, or you can leave it as is and go to the next step. The final step, well, you can put in how many stocks you wanna buy and how much money you have to invest.

So I have $100,000.00, I said I want 15 positions, but what this portfolio builder does is it finds the best of the best positions and build you the perfect portfolio it can following all of our rules. So it returned me seven positions. It doesn't mean there's not a lot more positions at Stansberry Research that are currently healthy, but what it means is these are the seven that are the least correlated in their performance, and this is exactly how to buy 'em.

So the first thing you see is that they're all healthy and in an uptrend. It follows our health-based stoplight system. It's really easy to follow if you know how to drive. Red means stop. Don't buy this stock, sell it if you own it. Green is a perfect time to buy. If you own a stock, this is a great time to load up on more. Yellow is just a caution state.

It's not a buy, it's not a sell, it's more of a hold. And these alerts that you get from this system, it's found thousands of stocks over the past two years, including during the pandemic, that outperform the S&P 500. That's what we want as investors. We wanna outperform the S&P 500.

Stocks like Sunworks, in about six months it went up over 1200 percent when our system signaled it. Even boring stocks like L Brands in a retail space. That has gone up in about a year, 171 percent since we got alerted. And then there's Party City. If this system didn't tell me to buy Party City, I would've just bet that, that stock was going to zero.

Because of the pandemic, I thought Party City and its retail space would never come back to life. It stock plummeted. But you can see in about a year's time, it went from around $2.00 all the way up to nine, 300 percent. So the system helps you time the markets really well, takes all of the emotion out of it by giving these buy and sell alerts.

The next thing you'll see on our perfect portfolio is this thing called a VQ. A lot of you have probably heard about the VQ. It stands for Volatility Quotient. It's measure of risk in every single stock or fund in our system. We cover about 100,000 stocks and funds in our system to date. And as VQ, the higher it is the more risky that stock or fund is, the lower it is the less risky it is.

And I will never tell you to look at that number and make a buying decision based on that number of should you buy or not. I believe you should have a great mix of low risk stocks, medium risk stocks, and high risk stocks in your portfolio. But there's a way to leverage that number to figure out how to buy them. So this one number, you can look at any stock or fund in our system, and right away, you know how risky or not risky it is. And you can also figure out how much of a stock or fund to buy.

So the third part I wanna show you on his perfect portfolio is this green box. And if you look on the right side of the green box, you'll see 4.37 percent risk per position all the way down. On the left side, you'll see position sizing. That's different for every single stock, because every stock behaves differently. But this is how you risk the same amount on every single position in your portfolio.

So I have $100,000.00 I wanted to invest, every single position, If it goes down and stops out, I will only lose, and it's a lot of money, so I don't mean only lose, but I will only lose $4,370.00 per position. I did not put too much money into a high risk stock, and I did not put too little money into a low risk stock. It's blended.

So you're probably thinking, well, how do I buy just one stock? We have a solution for that as well. That's a click a button and figure out how to buy. So I put Tesla in here. All I said was Tesla, I hit the, 'how much should I buy of Tesla?' We give you three scenarios.

You can customize each of these scenarios in a matter of 30 seconds. The first one just says, if I had $50,000.00 or I could make it 100 or 10, and I bought Tesla, how much am I risking? I'm risking $24,000.00. So that's a simple way to look at a single stock and figure out how much you're gonna risk, and should you buy it? I really like this way, but not as much as I like the third way. But the second way says, I have a $543,000.00 fake portfolio, but we'll pretend it's real. I wanna risk just one percent buying Tesla, of that portfolio.

Maybe I feel like Tesla's kind of risky, I wanna buy it, but I don't wanna risk too much of my portfolio. So I just wanna risk just over $5,000.00 on that portfolio by clicking one percent, it will tell me buy 12 shares to be able to do that. The third way is my favorite way. And it's because I believe your portfolio should be balanced across the entire portfolio, no matter what stocks you're buying.

The third way will look at a portfolio, and it will say, if this portfolio was perfectly balanced, how much of this stock should I buy? And at that point, it's telling me 70 shares of Tesla. These are just three scenarios that you can run through and figure out how to buy a stock using our platform. It's really easy to use. But then you might be saying to yourself, I don't wanna select the perfect portfolio because I don't wanna say, find me stocks.

I know I wanna buy two stocks or ten stocks or however many it is. So we also have a feature where you can tell it what stocks you wanna buy. So you should see on the screen, Apple is at a 27 percent VQ. Tesla's at a 48. You don't have to know any of that, our system does the work for you. But what it does is it will look at these two stocks, you tell it how much you wanna buy.

So I say, I wanna spend $20,000.00 buying these two stocks. And what it will do is it will tell you to put $12,000.00 or close to 13 into Apple and seven into Tesla, a little over seven. That's how you equalize the risk across those two positions. You also can rebalance the risk on entire portfolios. We can synchronize with all of the major brokerages out there. TD Ameritrade, Fidelity, E-trade, Schwab, and so forth.

And when we synchronize, we then can get an opportunity to tell you everything you need to know about your portfolio, but we also can have you click a button to rebalance it. And when you click that button, it tells you everything that you would need to do to rebalance risk across the entire portfolio.

As investors, this is the number one thing I would recommend going into the final innings of this bull market. Do not be overweighted in any single position inside of your portfolio. The end result reads like a recipe, and it helps you decide exactly how many shares to buy or sell across your portfolio to normalize that risk.

As I mentioned earlier, we track 27 billionaires in our system. We apply all of these methods, really timing when to buy a stock, how much to buy and when to exit to the same positions that they have. And we nearly beat all of the billionaires that we back tested over a 20 year period of time. Total, we beat 'em by about 50 percent using their stocks in our system. But what was really cool was when we did a 20 year back test study on the entire set of billionaires’ portfolios over 20 years, which was tons and tons of stocks to analyze.

We found that if we use our pure quant portfolio builder to build the perfect portfolio, we start that at the beginning. And every time a stock turned red, we replace it with the next green one in pure quant. The billionaires by themselves did about six times better than the S&P 500. So that right away should be able to tell you, they have incredible stock picks that you can leverage inside of our system.

We were able to nearly triple their performance by using pure quant, and the biggest edge it gives you is it's always hunting for stocks that are healthy and in an uptrend, because stocks have a tendency to continue to move the same exact way they were moving in a short term.

We also test on real portfolios. I was truly honored to be able to do a project with Steve Sjuggerud, Doc Eifrig, and Dan Ferris. And so what we did with their picks was – As you all know, they've been running portfolios at Stansberry Research for quite some time. What we did with them was we said, we're gonna buy exactly when they buy, but we're gonna change how much we buy based on our system, and we're also gonna change when we exit based on when it turns red in our system.

So Steve did what we all need him to do. He more than doubled the S&P 500. And remember, as investors, we just wanna beat the S&P 500. Of course, we wanna collaborate, and Steve Sjuggerud shows you exactly how to collaborate. But with our tools, we were able to get about a 50 percent better performance. Same exact stocks Steve was buying, no options, no leverage, no gimmicks, no cryptos, just the same stocks that Steve was buying. I should say stocks and funds.

And Dan Ferris had a similar story. He more than doubled the S&P 500. And we were able to inch out a little bit better game than what Dan had done on his own inside of those portfolios. But my favorite's Doc Eifrig. Doc and I have a great relationship. We give each other a hard time as much as we possibly can.

So Doc spent years giving me a hard time saying that we haven't been able to beat his performance. Then when I showed him this chart, and by the way, Doc nearly tripled the S&P 500. And that's huge, especially on an income product. I mean, that's just amazing. But when I showed him this, he then said, "Oh, you can't factor in COVID. I mean you can't sit there and give me a ding because of the whole COVID thing. You should probably just count my track record right up until COVID."

But I said, Doc, we have to tell everybody what's happening here. So we were able to take Doc's exact stocks and funds that he was buying, buy 'em at the same time, buy 'em in different proportions, and sell 'em at the optimal time. And we're able to even beat his performance as well.

So our goal is simple. We want you to make a ton of money with a lot less risk. If you know us really well, you know that we have TradeStops as our flagship portfolio tracking system. And we have this product called Ideas by TradeSmith, that is more of an approach to find out what's healthy in the markets and what stock should I be buying?

We combine both of them to meet investors where they're at and give them a holistic solution. We call that solution Trade 360. It has everything that we've discussed today, and a lot more that we haven't even talked about. It gives you a view of the market sectors and commodities, and it tells you how healthy they are, but also grades it by their components. We give you a portfolio tracker on steroids that synchronizes with your brokerage account.

We give you alerts, you get the VQ, and the health-based stoplight system for over 100,000 different stocks and funds in our system. Everything that you can think of is in there. We have the position size calculator. Whether you're buying one stock or fund, or you're buying 10, 20, 30, we can help you build perfect position sizing. Of course, we have the risk rebalance for portfolios that already exist, that you've already bought into, that you wanna balance your risk out for.

We have a newsletter center. It has 300 different newsletters in that newsletter center, including all of Stansberry Research and probably most of any newsletters that you subscribe to. You can click in there, find out their portfolio, see what's healthy, what's not, and you can use that to build yourself perfect portfolios.

We have all of the billionaire stocks, about 2000 in our system today. We have the pure quant portfolio builder, which is my favorite tool to use. It's what I used on March 27th to determine what to buy. And I leveraged Stansberry Research's data to figure out what I should be buying and how I should be buying it.

And the last thing which I didn't get a chance to cover today, we have what we call micro bull markets. We have this set of features that to takes our algorithms and finds incredible stocks that sometimes have explosive growth coming ahead of them based on our algorithms. We have found over 1000 stocks in three years that our algorithms have triggered buys on, that have gone up at least 100 percent. That's more than every single trading day that has happened since we released that three years ago. And what I love about it is that it can help you find a bull market anywhere.

It can help you find stocks that are going up when the markets are plummeting. It was great during COVID, it was great in all of our testing pre-COVID, and it has been wonderful for people who have used it. We take all of that and we bundle it into this beautiful dashboard that meets you when you log in, it greets you, and it helps you get to where you need to go and helps take your investments to the next level.

If you do not have Trade 360, but you're interested in getting it, you can of course call us. If you're in this room, you can go see our booth and talk to our team. You can also go to tradesmith.com/stansberry to see an incredible offer that we put together for you.

But this isn't all. I have one more thing I wanna tell you about. As an investor, I should say, about six years ago, I was trading a lot of different options. I was selling for income, selling puts, selling covered calls. I sometimes sold naked, which I do not recommend. I've been in serious trouble doing that. I would buy calls and buy puts, and my goal was to generate some income and then use that to juice up some returns.

But I got really frustrated because I would make ten great trades. Make a lot of money, and I would lose it all and more in one trade. And so I felt like there had to be a much better way. A lot of services out there will tell you the same option to play that everybody else gets to play.

So it was really hard to find what I should be doing as an options trader, as a person selling naked puts for income or covered calls or buying calls and puts. And if you're familiar with options, you've probably had a similar experience.

So about three years ago, I pitched my team a set of features that I would like to build, to build the best options product out there. And what I was met with was the data challenges, the billions of rows of data that we would have to consume, that we've never seen in the past because of how the options markets work. And I was also met with a lot of volatility in the options markets. you have to have real time tracking to be able to tell people what is happening and what they should be able to do.

So we shelved it for about two years, and I'd say about a year, year and a half ago, I brought it back up, because I was still sick and tired of losing. And I knew that we could build incredible algorithms that would be really successful for all of our customers and definitely for me as well.

So I just wanna introduce to you CoPilot by TradeSmith. This is your guide to better options trading every single day of the week. One of the coolest thing that I wanted to build was to be able to take advantage of really short term volatility and momentum and give people an idea of the types of options that they could trade for maximum success in less than a week. So personally, what I like to do is use this system to find naked puts that I can sell. Sell them to expire later in the week on Friday.

So I usually do this on Monday. Sometimes I do it the Friday before, like I did last week cause I knew I was traveling. And I take about three minutes to look at my system, look at my favorite stocks and figure out which I should sell. I then take that income and I take half of it and I just keep it there. I take the other half and I will buy calls and puts with it, so I can and sort of amplify those gains. I'll even put it into cryptos. I sorta look at it as found money because our system, when we have an 80 percent probability of profit on any trade that you make or higher in our back testing, 95 percent of those trades were successful. And that was such an incredible result. I knew that if I could stick to that 80 percent probability of profit, I have a huge edge.

The Vegas casinos are a 51 percent probability of profit and they generate billions and billions of dollars. With this system, you can generate a lot of income selling naked puts and covered calls, and you can also get the probability cons, a lot of fun facts, a lot of really important data about the trade you're gonna make. You can even find calls and puts that you can buy that have a high probability of hitting what we call an ROI.

So in this first case, I can put $310.00 into this call option that expires in less than four months, and I'm targeting a 600 percent return. If that comes in two days, a week, a month, I'm gonna sell it and take my money off the table. It's an incredible product, and if you're interested in it, I would suggest you go to buycopilot.com to check it out.

Talk to our team in the other room or give us a call at (866) 295-5103. Thank you very much. It's been an honor, and I hope to get to meet every one of you soon. Thank you.

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