**Keith Kaplan**

Keith is going to give a GPS for the market.

100,000 traders and investors trust TradeSmith to track and manage $30 billion.

It all started with Tradestops, a trailing stop software that solves 3 problems.

1. What to buy
2. How much to buy
3. When to sell.

Today, TradeStops is a full-featured portfolio and risk management software tool covering 150,000 different securities.

Trailing stops are a simple exit point you plan when you buy a stock. If a stock falls to the level of your trailing stop, you sell. But if the stock goes up, you stay in it.

As the stock makes new highs, the trailing stock adjusts. And again, when it falls to the level of that higher stop,, you sell.

The problem is most everyone uses a generic trailing stop of maybe 25%. But not all stocks are equal so why should stops be?

Tradestops offers something called “volatility quotient” trailing stops instead. These stops factor in a stock’s volatility to widen or narrow the trailing stop accordingly.

But how much to buy? As humans, we buy indiscriminately. But by using the VQ on one stock, we can apply it to the whole portfolio. And the VQ will balance the risk to ensure we bought the right amount.

This is how we manage risk across an entire portfolio.

And now, tradestops has introduced a stoplight to make buying easier. Green means “buy,” yellow means “hold” and red mean “sell.”

In 2022 the stoplight system worked well. It beats 89% of everyone they’ve tested it against in their ecosystem.

It tells you exactly when to transact, and removes emotion from the equation.

There’s a feature in tradesmith called PureQuant. You can throw a ton of stocks into PureQuant. Tell it about your preferred risk profile and position size. And PureQuant will spit out a perfect, risk-adjusted portfolio to your specifications.

Keith also measured billionaire’s performance vs. the market… and beat them with Tradestops too.

Keith ran the stock portfolios of 21 billionaires through PureQuant and, again, it gives a perfect portfolio within minutes.

There’s also a great, colorful portfolio analysis feature on Tradestops that gives you a recipe for how to improve your portfolio.

But there’s more… Keith and tradestops are willing to do portfolio studies for non subscribers of a certain net worth.

So how are the markets doing? People are worried. Retirees are returning to work to afford cost of living… it’s tough.

Keith doesn’t think you can determine bull or bear markets based on 20% moves. So he built a screen that measures every single component in the market, and applying them to indexes and sectors.

This has been a rough year… but based on this analysis, we see an uptick of red and yellow stocks. Not a great sign. But the rest of the system forecasts a nice rise for the quarter.

In 2024, though, the outlook is more bearish based on this indicator.

Tradestops employs analysts to help you understand the product, and the markets. One particular cycle indicator is looking bullish in both the short and long term frames. But things can change fast so Keith urges caution.

For the last two years, things have been deteriorating. And they could get better or worse from here. But tradestop screens show an uptick in “worse” so be cautious.

Fear indicators are rising. But the market has outperformed compared to 2022.

Keith points to the money flow going in and out of sectors in a tool called Money Movers. It shows strong balance in Energy. And other sectors are doing less well…

So what should we buy?

Well the whole toolkit Keith discussed today is part of Ideas by Tradesmith. It’s a top-down approach that tells you what stocks and indexes to buy today.

Keith loves factor based investing. See, many factors outperform: growth, value, and especially momentum. That last one trumps everything. But there are others, too.

Keith took his factor knowledge and programmed it in the system.

When two separate factors are both doing really good, it’s a great time to buy a stock that represents them.

Tradesmith can produce a factor-based model portfolio to help you pick stocks. And it works on crypto too. This product is called Crypto Ideas.

Keith highlights one single stock…

* Walmart. It’s doing well and is in an uptrend. Money moving shows institutions buying Walmart like crazy. But insiders are selling like crazy. It’s not terribly worrying but it gives it a negative money mover score. Institutions love it though, which is a great reason you should love it too.

Tradesmith incorporates machine learning and AI. Using the algotrithm, they tried to use machine learning to pick the market’s future. They asket the AI to design predictive rules. And the result was Predictive Alpha Prime, another Tradesmith stock picking tool.

Tradesmith isn’t tuned to earnings just yet. But they’re working towards that via machine learning. This will help predict earnings in a much better way.

And Keith is dabbling in quantum machine learning to help predict black swan events.

But the most recent product is a new Predictive Alpha model to pick options. It can use different options approaches.

It puts option volatility on a curve. When volatility is low, you buy options. And when it’s high, you sell options. And Tradesmith has a proprietary system to bring this information to investors.

There’s another tool in the worsks, too – Neural Network Image Processing.

This is still in the works. But it takes all the drawings of lines by technicians on a chart… and then picks the best line to guide your trading.

There are a lot of stocks showing up as “healthy” in the Tradesmith system.

Keith has lost money on options and wanted to know the probability of success before he’d trade more in the future.

In 2022, Keith used this system to trade options. It has a 95% win rate. This tool is called Options360. And it tells you the probability of profit. If the probability of profit goes above 88%, the program has a 95% win rate. And if a tool doesn’t have a win rate that high, Keith throws it out of the program.

This year tradesmith released a covered call builder. It builds you covered calls to sell against the stocks you own. You can tell it you want shares called away, or not. And it does all. The work for you.

Keith plugged a few stocks into this sytem and got four options trades returned to him in seconds.

This is all wrapped up in a beautiful dashboard. This page will meet you wherever you are in your investing journey and help you get where you’re going next.

Tradesmith has a lot of products, and a lot of top analysts who help make sense of them. And they can help you outperform.

But overall, Keith urges you to play defense and follow your stops.