



Club Member Research Checklist

Company: _____

Date: _____

1. Fundamentals NEXT EARNINGS DATE: _____

QUALITY SCORE: out of _____ (____ / 52)

RIGHT TIME TO BUY SCORE out of _____ (____ / 52)

SHARE PRICE TO BOOK VALUE RATIO: _____ (<3:1?)

MANAGEMENT OWNERSHIP %: _____

SIGNIFICANT NEWS: _____

2. TECHNICALS

30 to 90 DAY SUPPORT PRICE: _____

30 to 90 DAY RESISTANCE PRICE: _____

52 WEEK High PRICE: _____

52 WEEK Low PRICE: _____

TREND: (UP – OTM) or (SIDEWAYS – ATM) or (DOWN - ITM): _____

VIX (Normally 20 – 30 but can go up to 50) Current Value?: _____

Current Price: _____ At Support or At Resistance?: _____

3. STRATEGY (WHY?, WHAT?, WHEN? / Plan B?)

A) If “rolling” BUY LOW at Support and SELL HIGH at Resistance

Buy Price: _____ Sell Price: _____

% profit on roll: _____

How often to roll?; weekly, fortnightly or monthly: _____

B) If “covered call” strategy

Buy Price: _____ (Value Line Option Score out of 1 to 5): _____

Sell Call (month): _____ at Strike: _____ For Price: _____

% profit if called out: _____ % profit if not called out: _____

4. PROTECTION / PLAN B

(IF DOWNSIDE PROTECTION REQUIRED)

BUY PUT in (month): _____ at Strike: _____ For Price: _____

(Only if club has more than \$50,000 in its account)

IF DECISION TO BUY: _____ STOCK at Price: _____

SELL PUT in (Month): _____ at Strike: _____ For Price: _____