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# TOGGLE AI

## Trade Ideas: 1% Inspiration, 99% Perspiration.. Or is it?

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TOGGLE AI

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# TOGGLE

TRADE IDEAS: 1% INSPIRATION, 99% PERSPIRATION ...  
OR IS IT?

February 2022

tog•gle

/ˈtägəl/

verb

1. COMPUTING

switch from one effect, feature, or state to another by using a toggle.  
"the play/pause button toggles between those functions"



## Disclaimer



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## (PROFITABLE) INVESTING IS HARD WORK



Finding promising trade ideas regardless of style – day-trading, swing-trading, fundamental – requires a substantial time commitment

- Data is widely available (and often free) but **dispersed across numerous sites** (FinViz, Yahoo Finance, TradingView ...) and still **has to be analyzed before it's useful**
- **News and data changes daily**, often several times intra-day
- **Market data is constantly updating** (prices, volume, positioning)

So how do you follow all this for not one stock, but hundreds? It's like sipping from an ocean with a straw.

# THE 99% PERSPIRATION APPROACH



## The time-tested workhorse: EXCEL stock screener

1	SYMBOL	CLOS	3 Month	6 Mon	9 Mon	12 Mon	3 Month Gain %	6 Months Gain	9 Months Gain	12 Months Gain	Turnover
164	AVTNPL	299.25	408.7	206.25	116.3	111.6	-26.78003425	45.09090909	157.3086844	168.1451613	710066.25
165	BINDALAGRO	60	71.4	90.65	51.95	22.5	-15.96638655	-33.81136238	15.49566891	166.6666667	5000417.5
166	GALLISPAT	112.35	90.3	89.2	71.05	51.2	24.41860465	25.9529148	58.12807882	119.4335938	11066862.3
168	GUJFLUORO	398	538.45	343.55	303.9	208.65	-26.08413037	15.84922137	30.96413294	90.75005991	29758778.9
169	INSECTICID	402.2	376.35	315.05	296.25	213.6	6.86860635	27.66227583	35.76371308	88.29588015	28303126.25
170	UTVSOF	975.45	965.8	732.2	548.9	526.05	0.999171671	33.22179732	77.70996539	85.42914172	26688205.2
171	VSTIND	1144.35	1274.1	901.55	642.9	620	-10.18365905	26.93139593	77.99813346	84.57258065	2341401.5
172	TTKPRESTIG	2685.05	2825.5	2743.05	1959.05	1474.9	-4.970801628	-2.114434662	37.05877849	82.04963048	108041470.8
173	GRAVITA	380.25	321.4	368.65	284.6	209.75	18.31051649	3.146616031	33.60857344	81.28724672	183633799.5
174	GITANJALI	336.25	339.5	293.2	214.2	188.15	-0.957290133	14.68281037	56.97945845	78.71379219	270836190.8
175	ALFALAVAL	2164.95	1834.05	1576.8	1343.3	1213.2	18.04203811	37.30022831	61.16653019	78.4495549	7422308.45
176	PAGEIND	2630.55	2635.05	1737.35	1558.7	1478.95	-0.170774748	51.41163266	68.76563803	77.86605362	2343426.3
177	TATACOFFEE	781.55	852.7	843.75	853.3	457.1	-8.344083499	-7.371851852	-8.408531583	70.98009188	53364919.35
179	BATAINDIA	578.15	678.1	528.75	344.2	346.5	-14.73971391	9.342789598	67.96920395	66.85425685	297024628
180	VISASTEEL	58	58	59.5	45.05	34.8	0	-2.521008403	28.74583796	66.66666667	1195183.15
181	AJANTPHARM	319.3	330.8	300.65	197.7	194.1	-3.476420798	6.203226343	61.50733434	64.50283359	3162138.05
182	ARVIND	80.55	93.5	82.85	55.35	49.7	-13.85026738	-2.776101388	45.52845528	62.07243461	115586693.5
184	INEABS	586.7	549.9	680.85	350.15	373	6.692125841	-13.82830286	67.55676139	57.2922252	584319.5
185	REPRO	160.6	141.4	132.4	88.3	103.3	13.57850071	21.29909366	81.8799547	55.46950629	1832535.95
186	SHRENUJ	61.35	54.35	54.7	47.35	39.9	12.87948482	12.15722121	29.56705385	53.7593985	67576.45
187	RAITV	70.9	56	53.5	59.4	46.2	26.60714286	32.52336449	19.36026936	53.46320346	12191265.65
188	LAOPALA	103.15	113.25	70.45	62.3	68.2	-8.918322296	46.4158978	65.56982343	51.24633431	795443.05
189	BLUEDART	1487.05	1677.95	1374.7	994.8	984.6	-11.37697786	8.172692224	49.482308	51.03087548	1261202.9
190	AMTEKINDIA	89.9	116.9	87.55	73.1	59.95	-23.09666382	2.684180468	22.98221614	49.95829858	32130359.35
191	MANINDS	114.6	143.7	127.15	59.85	78	-20.25052192	-9.870232009	91.47869674	46.92307692	7847753.95
192	LUMAXIND	382.15	350	346.95	307.75	261.8	9.185714286	10.14555411	24.1754671	45.97020626	1469885.85
193	MVL	24.15	25.35	27	27.4	16.6	-4.733727811	-10.55555556	-11.86131387	45.48192771	11882828.05

Source: Toggle

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## BUT HOW DO YOU KNOW WHAT LEVELS TO SCREEN FOR?



“Cheap” varies by industry and even by individual stocks. A “cheap” stock could prove very costly in hindsight (e.g. “value trap”),



### What Is Undervalued?

Undervalued is a financial term referring to a security or other type of investment that is selling in the market for a price presumed to be below the investment's true intrinsic value. The intrinsic value of a company is the present value of the free cash flows expected to be made by the company. An undervalued stock can be evaluated by looking at the underlying company's financial statements and analyzing its fundamentals, such as cash flow, return on assets, profit generation, and capital management to estimate the stock's intrinsic value.

Source: Investopedia

Source: Toggle

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# IT'S TIME FOR A NEW INVESTING DASH





# THE 1% PERSPIRATION APPROACH



The machine can monitor drivers across thousands of assets you watch

My Securities All (15) Portfolio (0) Watchlist (15)

ALL ASSETS			What's currently moving the asset?
	<b>AMC</b> AMC Entertainment	\$40.79	+2.00/+5.16% <span>↑</span> News Highlight <span>+2</span>
	<b>EEM</b> EEM ETF	\$51.10	+0.24/+0.47%
	<b>GBPUSD</b> GBPUSD	\$1.36	-0.0112/-0.82%
	<b>GC</b> Gold	\$1,763.90	-25.50/-1.43%
	<b>HSCEI</b> HSCEI	HK\$8,856.99	-6.84/-0.08%
	<b>LYFT</b> Lyft	\$49.03	+3.71/+8.19% <span>↓</span> Technicals <span>+3</span>
	<b>NFLX</b> Netflix	\$688.29	+10.57/+1.56% <span>↑</span> News Highlight <span>+5</span>
	<b>NIKE</b> Nike	\$172.50	+4.67/+2.78% <span>↑</span> News Highlight <span>+3</span>
	<b>PYPL</b> Paypal	\$230.38	+0.92/+0.40% <span>↑</span> Fundamentals <span>+4</span>
	<b>US_G10Y</b> US TREAS 10Y (USD)	1.579 %	+0.03/+2.07% <span>↑</span> Technicals
	<b>T</b> AT&T	\$25.18	-0.05/-0.20% <span>↑</span> News Highlight <span>+1</span>
	<b>TAN</b> TAN ETF	\$97.15	-0.15/-0.15%
	<b>TSLA</b> Tesla	\$1,213.86	+41.86/+3.57% <span>↓</span> News Highlight <span>+2</span>
	<b>USDJPY</b> USDJPY	¥114.00	+0.0300/+0.03%

Source: Toggle

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## HELP IS ON THE WAY



Smart assistants are ubiquitous in our daily lives... Why don't they exist in investing?

- Machines are really good at monitoring and processing **large amounts of information**
- They can **uncover price patterns in assets** around events/data changes
- They can **test each relationship for robustness** ... in seconds
- They can **deliver curated insights** tailored to specific users

## CAN SMART MACHINES HELP ACTIVE INVESTORS/TRADERS?



Human intelligence is very good at strategy (the “big picture”) but AI can be helpful with the tactics (the “details”).

For example, a portfolio manager decides they want to be long risk in equities and let the machine highlight the assets that are most undervalued/have strongest momentum.

## CAN SMART MACHINES HELP ACTIVE INVESTORS/TRADERS?



Where in the investment process can machines add most value

- Idea generation (“What assets best reflect my thesis?”)
- Hypothesis testing (“Is my hunch/instinct correct?”)
- Asset due diligence (“What am I missing?”)
- Portfolio risk management (“Do I really want to sell here? Should I get out?”)

# MACHINES ARE ... GOOD WITH NUMBERS



Instead of competing with them, machines can empower users by replicating – fast – the work investors are already doing

TSLA:NASD - Tesla may have 13% upside due to a bullish combination of Analyst Revisions and Analyst Expectations indicators

by Toggle A.I. Oct-25-2021

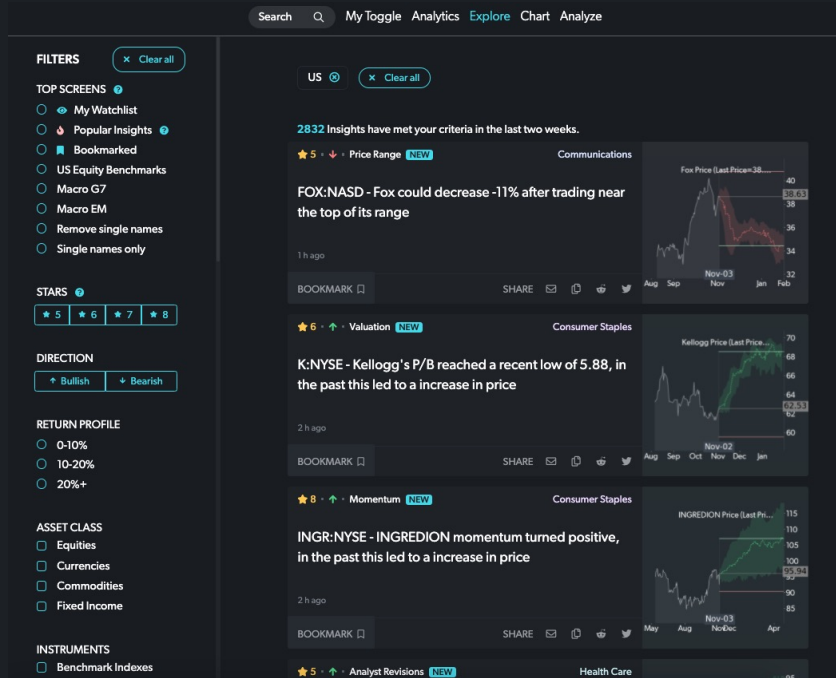
Analyst Revisions indicators for [Tesla](#) are improving. Historically, this led to a median increase in [Tesla](#) price of 13% over the following 1M, as shown in the chart below. TOGGLE analyzed 4 similar occasions in the past to produce the median projection and the confidence band below ([How do you do this?](#), most recently on [2021-08-18](#). This insight received 5 out of 8 stars ([What are stars?](#)) in our quality assessment.



Source: Toggle

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Machine-generated ideas can connect a view to specific assets that best reflect it



Source: Toggle

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# UNDERSTANDING THE STOCK PRICE DRIVERS



Typical week is full of headlines

**Despite Jobs Blowout, Here's a Reason to Bet on a Less Aggressive Fed**

**Amazon and Nike reportedly interested in buying Peloton**

**Spotify CEO Apologizes but Says Joe Rogan Won't Be Removed From the Platform**

**Nasdaq sheds 4% as worst tech selloff since 2020 tanks US stocks**

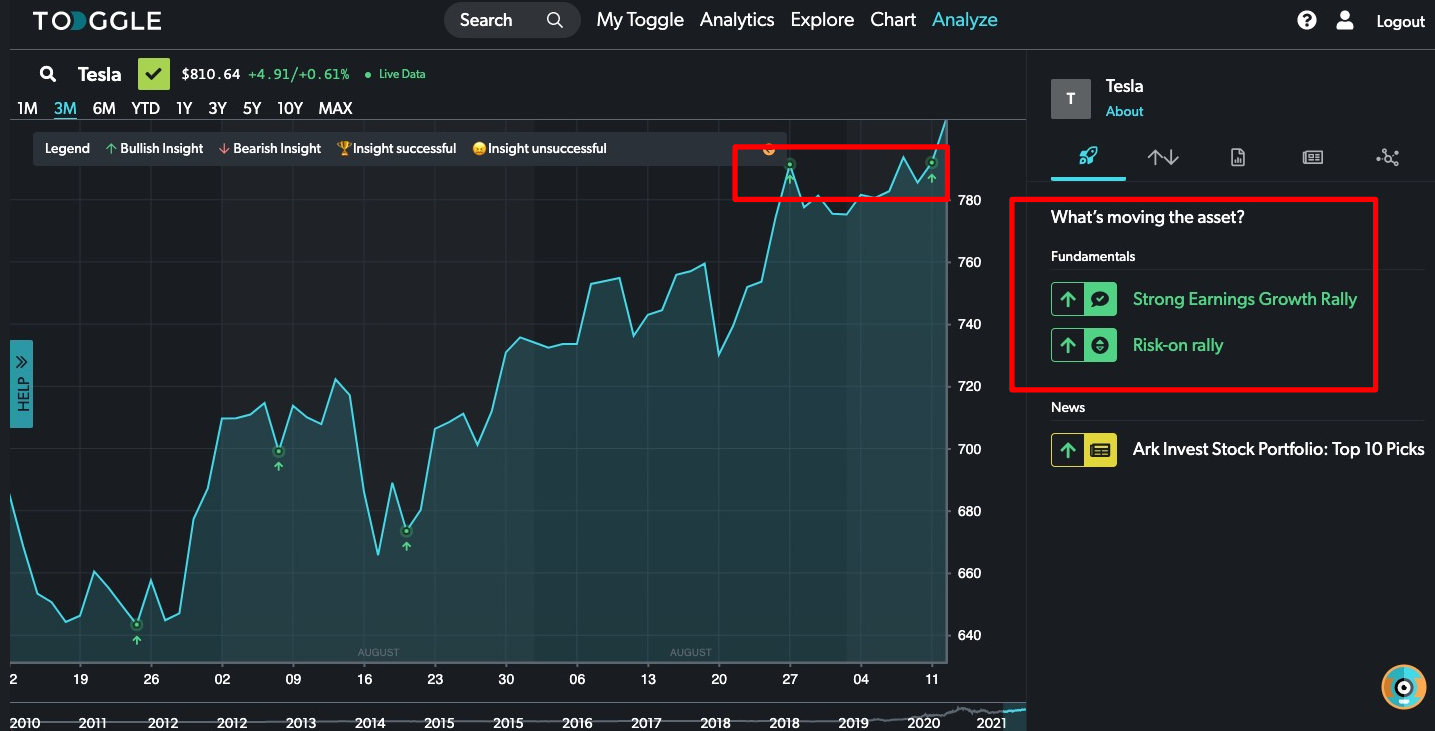
# TOGGLE AI PINPOINTS PRICE-MOVING NEWS HEADLINES



Source: Toggle

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# TOGGLE HELPS YOU UNDERSTAND THE "WHY"



Source: Toggle

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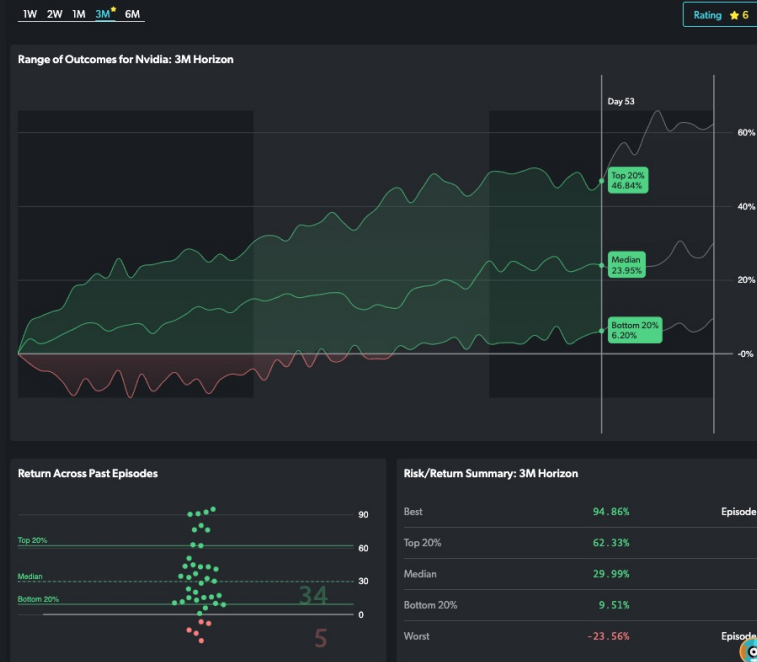


CONFIDENTI

# LOOK BEFORE YOU LEAP (TRADE)



Machines can help you test your instincts against the data: has the sell-off gone far enough? Historical data can give you a lot of answers.



Source: Toggle

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