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June 15, 2022

Toggle AI

Finding Original Stock Ideas – More, and Faster

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Toggle AI

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FINDING STOCK IDEAS - MORE, AND
FASTER

IB Webinar - June 15, 2022

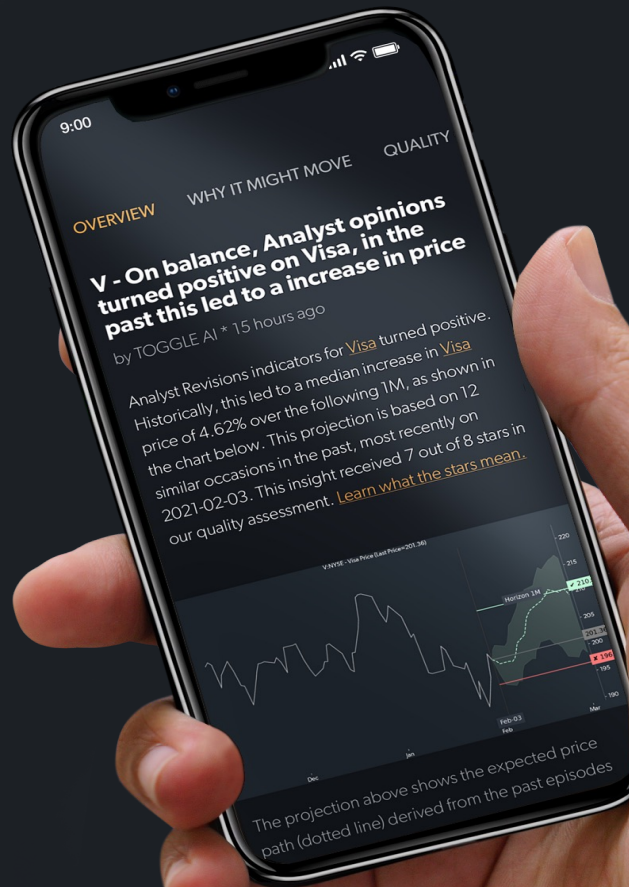
tog•gle

/'tägel/

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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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.

HOW DO YOU TURN THIS ...



Daily barrage of data and news averages 17 headlines per second

yahoo/finance

**Stock market news live updates:
Stocks fall as bond yields push higher**

**Russian menace brings
abrupt end to the west's
'peace dividend'**

ECONOMY

ECB Plans July Rate Increase as Inflation Problem Deepens

TECHNOLOGY

**In reversal, Twitter plans to comply with
Musk's demands for data**

**Nobel Laureate Shiller Sees 'Good
Chance' of a US Recession**

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... INTO A COHERENT PORTFOLIO?



The key to avoiding risks and spotting opportunities is cutting through the noise

My Securities				+ All (16)		Portfolio (0)		Watchlist (16)	
ALL ASSETS			What's currently moving the asset?						
	9984 SOFTBANK GROUP C	¥5,659.00	+96.00/+1.73%	↑	📊	Fundamentals			
	AAPL Apple	\$146.36	-1.60/-1.08%	↓	📰	News Insight	+4		
	AMZN Amazon	\$119.97	-1.21/-1.00%	↑	📊	Fundamentals			
	BTCETH BTCETH	ETH16.86	-0.31/-1.81%						
	BTCUSD Bitcoin	\$30,076.23	-109.35/-0.36%						
	ETHUSD Ethereum	\$1,804.60	+14.18/+0.79%						
	GBPUSD GBPUSD	\$1.2536	-0.0005/-0.04%	↑	📊	Technicals			
	GC Gold	\$1,853.60	+4.40/+0.24%	↑	📊	Technicals	+1		
	GME GameStop	\$138.73	-7.77/-5.30%	↑	📊	Fundamentals			
	MSFT Microsoft	\$270.41	-2.09/-0.77%	↑	📊	Technicals	+1		
	MT ARCELOMITTAL ADR 1:1	\$31.65	-1.74/-5.21%						
	NIKLA NIKOLA	\$7.02	+0.56/+8.67%	↓	📊	Technicals			
	PTON Peloton	\$11.61	-0.58/-4.73%						
	TSLA Tesla	\$750.70	+25.10/+3.46%	↓	📰	News Insight	+4		
	TWTR Twitter	\$40.46	+0.02/+0.05%	↓	📰	News Insight	+5		
	WMT Walmart	\$123.57	+1.27/+1.03%	↓	📰	News Insight	+3		

Source: Toggle

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CAN'T WE HAVE SOME HELP?



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.

SMART MACHINES CAN OFFER HELP TO ACTIVE INVESTORS



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?”)

IDEA GENERATION



Machines can identify potential price drivers across 100s of stocks



Source: Toggle

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MACHINES ARE ... GOOD WITH NUMBERS

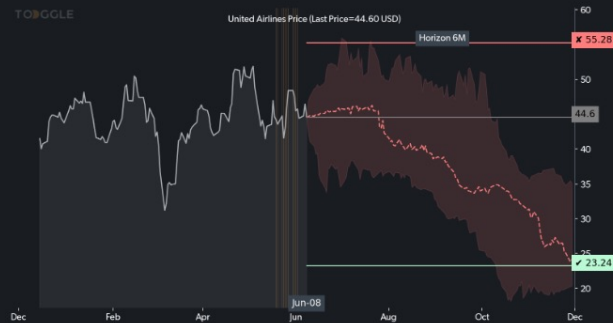


AI-powered systems can do fast robustness checks on any driver

UAL:NASD - Analyst opinions of United Airlines's fundamentals are coming down, in the past this led to a decrease in price (hit rate: 85% price: 44.60 date: 2022-06-08)

by Toggle A.I. 9 h ago

Analyst Revisions indicators for [United Airlines](#) <UAL:NASD> are coming down. Historically, this led to a median decrease in [United Airlines](#) price of **-47.89% over the following 6M**, as shown in the chart below. TOGGLE analyzed 8 similar occasions in the past to produce the median projection and the confidence band below ([How do you do this?](#)), most recently on **2022-05-19**. This insight received 5 out of 8 stars ([What are stars?](#)) in our quality assessment.



Source: Toggle

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LET AI MONITOR ALL YOUR IDEAS AND TRADES



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?
	AMC AMC Entertainment	\$40.79	+2.00/+5.16% ↑ News Highlight +2
	EEM EEM ETF	\$51.10	+0.24/+0.47%
	GBPUSD GBPUSD	\$1.36	-0.0112/-0.82%
	GC Gold	\$1,763.90	-25.50/-1.43%
	HSCEI HSCEI	HK\$8,856.99	-6.84/-0.08%
	LYFT Lyft	\$49.03	+3.71/+8.19% ↓ Technicals +3
	NFLX Netflix	\$688.29	+10.57/+1.56% ↑ News Highlight +5
	NIKE Nike	\$172.50	+4.67/+2.78% ↑ News Highlight +3
	PYPL Paypal	\$230.38	+0.92/+0.40% ↑ Fundamentals +4
	US_G10Y US TREAS 10Y (USD)	1.579 %	+0.03/+2.07% ↑ Technicals
	T AT&T	\$25.18	-0.05/-0.20% ↑ News Highlight +1
	TAN TAN ETF	\$97.15	-0.15/-0.15%
	TSLA Tesla	\$1,213.86	+41.86/+3.57% ↓ News Highlight +2
	USDJPY USDJPY	¥114.00	+0.0300/+0.03%

Source: Toggle

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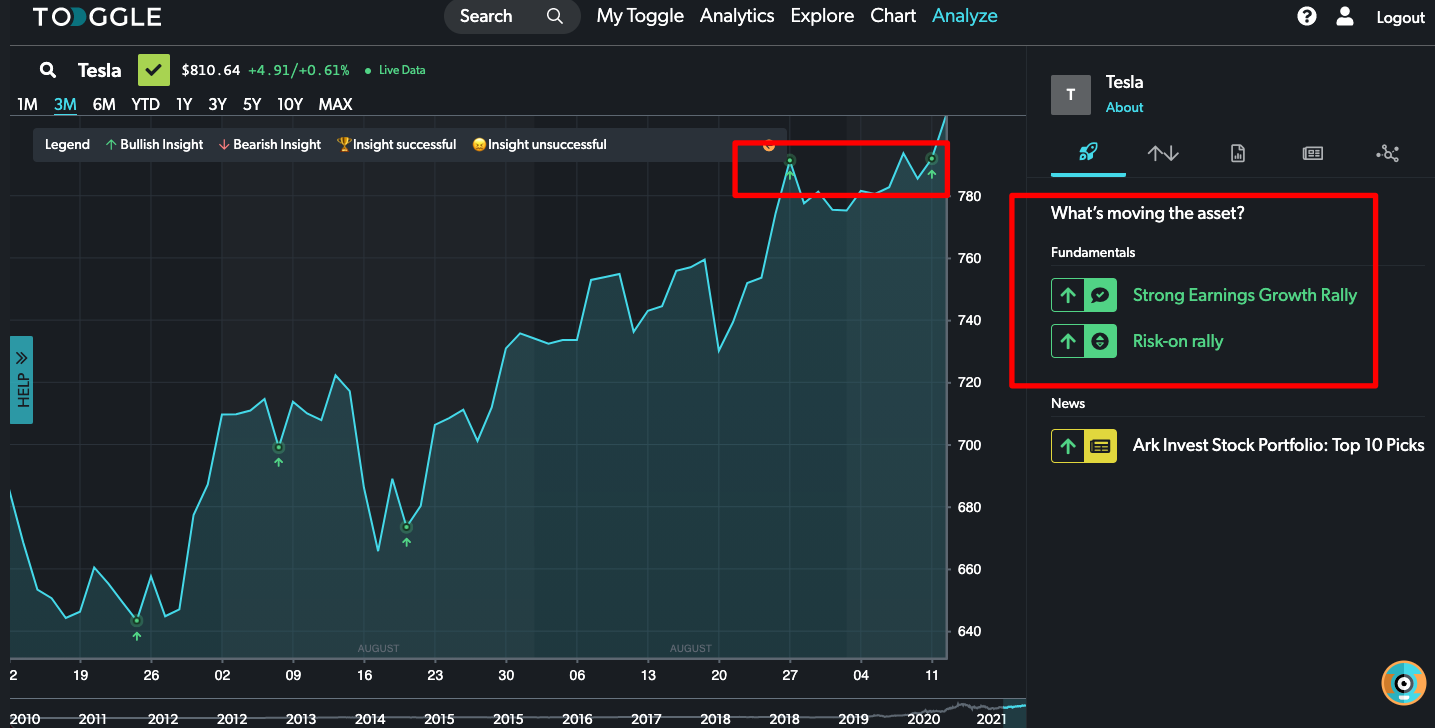
AI PINPOINTS PRICE-MOVING NEWS HEADLINES



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AI HELPS YOU UNDERSTAND THE "WHY"



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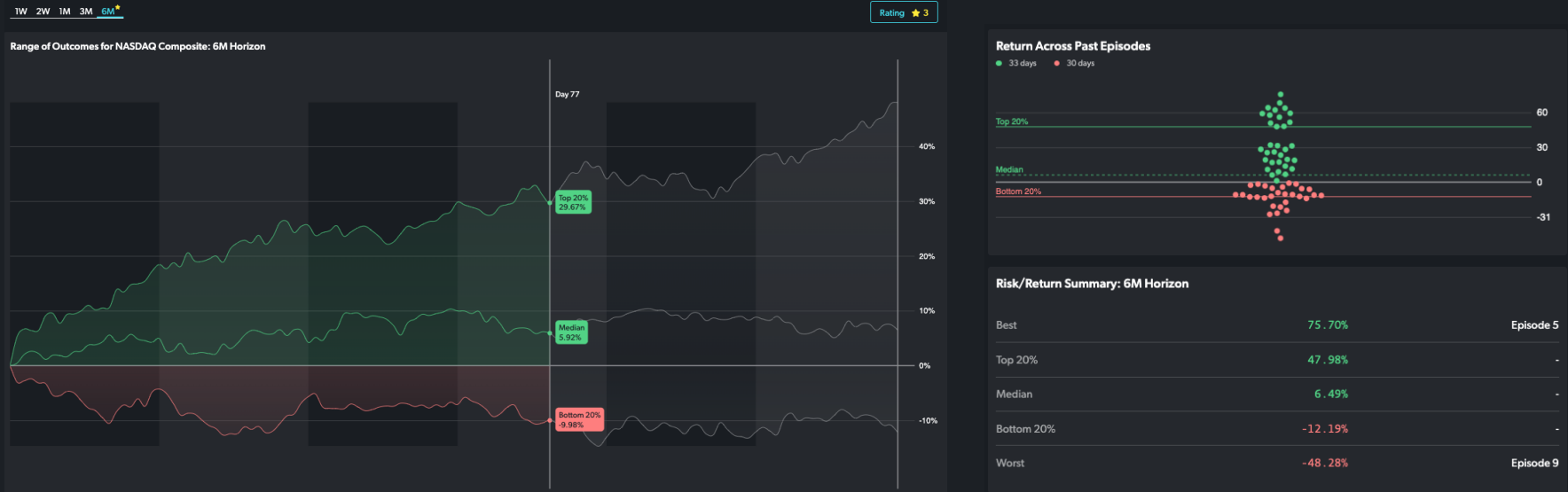


CONFIDENTI

LOOK BEFORE YOU LEAP (TRADE)



Is 10% sell-off in Nasdaq over a week an opportunity? Historical data can give you a lot of answers.



Source: Toggle

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Questions?

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