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## Answerable to someone

Hmmm, so Brenda B. wants to take on Chartman? Well, that's what she tried to do in her column. But really, isn't that always the way those fundamentalists who want to increase their position by demolishing technicians? Boy, talk about a zero-sum game. It's as if these fundamentalists can't win unless someone else loses! Taking on Chartman: Join the discussion in our discussion forums. no, I'm just ribbing Brenda. Honestly, I love this woman and I have the utmost respect for her. And, frankly, as opponents go, there are a few around who are much tougher. I mean a look at this pedigree: Rhodes Scholar, Harvard graduate, cable ace award winner. Plus, she's pretty damn nice. So I'll have my hands full to fend off her arguments - arguments that basically say you can't plot investment funds. (It was in the overthrow of my column, which essentially claimed that you could chart investment funds. In fact, I made another argument that you can chart everything as long as vertical, or y-axis, is limited by physical, emotional or psychological support and resistance. Hence, the last chart of my daughter Diana's swimming times.) OK, so let me take Brenda points one by one and see if I can make progress. With the action, you're charting the same damn company. But the investment fund is a growing entity, Brenda wrote. Her point was that a manager like Legg Mason Bill Miller could change the fund mix at any time. As an example, miller's sales from America Online (AOL) are given. This is an important point, but I wonder how important? Let's say Miller sold a huge chunk of his AOL holdings. Moreover, suppose that these shares accounted for 15% of his portfolio. So even if he sold 75% of his AOL, only about 10% of his portfolio would be affected. And this is the worst case scenario. Since AOL appears to be its largest holding company, its other positions in companies such as Dell (DELL) - Get Report and Nextel Communications (NXTL) are just 5%! So if you sold 75% of them, the net impact would be less than 4%. So, of course, these funds are a bit liquid, but let's not overestimate the impact of changing positions. These giants are like battleships, and each change registers like a bullet hit the hull. What more, what did he do with aol influences? I'm betting i sank at least part of this back to another company in the tech industry. The company I'm betting on has almost the same chart features as AOL. Judging from his holdings and his methodology, it's pretty clear that he didn't sell AOL to buy Newmont Mining (NEM) –

Get Report. No, I sold AOL and probably picked up something like Microsoft (MSFT) – Get Report. To further weaken Brenda's argument, Miller's annual portfolio turnover is 19%. Not only does it control the battleship, but it slowly --- it slowly enough that what it really shows is the sum of the which make up its fund. Remember, I never said fund charts were as clean as time, time, if Miller's fund is an indication, we can certainly get close enough. Many managers hold a cash cushion. This may change depending on their market prospects. It might throw a curveball to the chartist, too, wrote Brenda. Let's see, as of June 30, Miller had 6.59% of his assets in cash. 6.59%? Surely 65.9% would be a problem, but 6.59%? If it's a curveball, it certainly hangs just above the strike zone. No, this amount of cash can make the fund charts a bit unclear, but we'll settle for 93.41% accuracy! Should you use technical analysis to try trading funds, how do you do inventory? No, Brenda wrote. He says that the reasons why you shouldn't do this are that it's really hard to do well and that it's expensive. He concludes: TA is not an abbreviation. Boring and basic, as it is, you need to do the basic work. Let's do it step by step. It's hard to do well. Yes, OK. So what? Is it easier to carry out basic work on these funds? I bet that's not because I can set up a fund in 30 seconds, but I know I couldn't do the basic work on the fund in 30 seconds! It is expensive. Yes, perhaps it is. But if you avoid some of these funds' 40% declines, these extra charges and fees become nit compared to what you end up saving. TA is not an abbreviation. You need to do the basic work. Well, I'm not sure we have proof that TA is not an acronym. In short, how do we know? Yes, no. Brenda makes many earlier arguments, and if they were stronger, we could see that TA was worthless. But I don't think that's the case. And while she may have pointed out that TA for funds is not as strong as it is for stocks, it is no different from my original claim. But let's say I lean back, award her every point and admit that using TA on funds is hogwash. So we're then left with a fundamental analysis that Brenda suggests is better than TA with the funds. But how do we know that? Was there a test? Any rigorous assessment that the fund's bases are matched to its performance? In the end, I will admit that TA gives you an advantage - but only an advantage - in analyzing both funds and stocks. But if you think you have a better advantage using the basics, well, I think you're achieving a little bit, Brenda. The fact is that you have not negotiated my arguments for using TA, nor have you made a strong argument for using the basics! The ball is in your court... Gary B. Smith is a freelance writer who trades to his own account from his Maryland home using technical analysis. At the time of publication, he did not occupy any positions in any of the securities listed in this column, although the shares are subject to change at any time. Under no circumstances shall the information contained in this column constitute a recommendation for the purchase or sale of shares. Smith writes five columns of technical analysis TheStreet.com every week, including Technician's Take, Charted Territory and TSC Technical Forum. Although he may not provide investment advice or welcomes your views on the gbsmith@attglobal.net. Just over a decade ago, I had the great pleasure of hearing my son's inaugural address. Eric Lander, project leader of the human genome, described his journey through science and life. He shared that he didn't have a clear direction as a major in mathematics at Princeton and the labyrinth of decisions that followed to introduce him to genetic biology. He also shared the process of science and its adoption into the culture and economy of the modern world. His punchline was that it took a generation to understand and incorporate scientific discoveries into the economy and culture, as my father once told me. There are many things that sound true from this remarkable scientist, but I no longer agree with his assessment of the rhythm of innovation. It's faster — much faster. The innovation cycle, which began in chemical laboratories, thousands of experiments and hundreds of clinical trials, has been replaced by millions of natural experiments a day. This applies not only to elite scientific disciplines, but also to what is happening in our daily social life—as we know it. Every communication we make, or virtually every step, can be tracked and tested for predictive power. The fuel for this acceleration was data — a lot of data. From micro-assays to blogs, the data explosion was like a meteorite. The challenge, as always, is to turn raw data into real-world observations that can indicate reliable patterns and signals that provide detailed information and predict results. Today, by combining big data economics, data analysis, cataloging, advanced visualization and machine learning, we are able to build an ecosystem that breaks the generational barrier. Instead of waiting decades for discovery to become an accepted theory, we can now create insights in days or weeks and act on them immediately. In other CIO.com, I wrote about how this acceleration led to predictive M&A actions, dramatic reductions in data management costs, and resolved the issue of maintaining the best talent. The data management and information analysis pipeline is further consolidated. The combination of my company, Podium Data and Qlik is an example of how the market will structure itself to provide end-to-end solutions where data scientists, knowledge workers and consumers can effectively collaborate on business decisions. Here are some rules that I think are crucial for the future ecosystem: Raw to ready: the system should automatically identify dirty data, incorrect data types, and semantically ambiguous or questionable data. If your data is structurally unhealthy, you can't analyze it for patterns and insights. Self-service shopping: Information seekers should be able to browse, browse, and buy through a smart directory that is well documented and accessible. Democratization of data and analysis extends the community from for a wide range of consumers with access to well-proven, regulated data. A key element of this expansion is the ability to read and write data to ensure that employees can take full advantage of these new opportunities. Fast iterations: Analysts should be able to load, access, prepare, and analyze data in minutes without IT professionals in a loop. Unlike the traditional silo'd approach of analytical sandboxes, the new paradigm provides a common platform that manages data throughout the DataOps lifecycle from discovery to production. It further connects the communities of data analysts and business analysts and supports the acquisition of information such as the most popular or reliable datasets. These principles optimize the basic analytical metric I defined 10 years ago: What is your time to respond? We know that companies that can respond in hours rather than days (and days instead of months) don't just save time and money — they actually change operations. Analytics begins to inform about urgent business decisions, processes become instrumented for optimization, data and insights become new products. Just look at how companies with rich data and flexible analytics (Amazon, Google) are attacking traditional markets (insurance, banking, retail). Corporate boards and C-suite executives are launching strategic digital transformation programs to compete in this new world. The installment of these programs is a flexible, integrated data and analytics ecosystem that accelerates response time and enables a rapid testing and learning cycle. Copyright © 2018 IDG Communications, Inc. Inc.

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