

Chartbook Review

(charts as of 04/02/2025)

Most Requested Names:

MSFT, BE, EQT, FCX, IBM, ISRG, JPM, TEAM, VRT

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Chartbook: Stocks of Interest

Sym	Company	trkPrice	Sector ▲	Industry
TT	Trane Technologies	347.94	Basic Materials Sector	Building Materials
FCX	Freeport-McMoran Inc	38.20	Basic Materials Sector	Copper
DD	E.I. du Pont de Nemours and Com	75.25	Basic Materials Sector	Specialty Chemicals
T	AT&T Inc	28.14	Communication Services Sector	Telecom Services
AEO	American Eagle Outfitters Inc	12.65	Consumer Cyclical Sector	Apparel Stores
LULU	Lululemon Athletica Inc.	282.75	Consumer Cyclical Sector	Apparel Stores
TJX	TJX Companies Inc	124.93	Consumer Cyclical Sector	Apparel Stores
BWA	Borg Warner Inc	29.12	Consumer Cyclical Sector	Auto Parts
HD	Home Depot Inc	370.89	Consumer Cyclical Sector	Home Improvement Stores
NFLX	Netflix Inc	935.52	Consumer Cyclical Sector	Media - Diversified
BROS	Dutch Bros Inc	62.65	Consumer Cyclical Sector	Restaurants
AMZN	Amazon.Com Inc	196.01	Consumer Cyclical Sector	Specialty Retail
BABA	Alibaba Group Holding Ltd	129.79	Consumer Cyclical Sector	Specialty Retail
CPNG	Coupang Inc	22.49	Consumer Cyclical Sector	Specialty Retail
SE	Sea Limited	134.58	Consumer Cyclical Sector	Specialty Retail
COST	Costco Wholesale Corp	965.08	Consumer Defensive Sector	Discount Stores
CALM	Cal-Maine Foods Inc	93.08	Consumer Defensive Sector	Farm Products
EQT	Eqt Corporation	54.62	Energy Sector	Oil & Gas E&P
BKR	Baker Hughes Company	44.92	Energy Sector	Oil & Gas Equipment & Services
SLB	Schlumberger Ltd	42.19	Energy Sector	Oil & Gas Equipment & Services
OKE	Oneok Inc	100.37	Energy Sector	Oil & Gas Midstream
VNOM	Viper Energy Partners LP	45.94	Energy Sector	Oil & Gas Midstream
OWL	Blue Owl Capital Inc	21.16	Financial Services Sector	Asset Management
JPM	JPMorgan Chase and Co	245.82	Financial Services Sector	Banks - Global
MUFG	Mitsubishi UFJ Financial Group, In	13.22	Financial Services Sector	Banks - Global
HOOD	Robinhood Markets Inc Class A	42.68	Financial Services Sector	Capital Markets
IBKR	Interactive Brokers Group Inc	174.31	Financial Services Sector	Capital Markets
MS	Morgan Stanley	119.27	Financial Services Sector	Capital Markets
TW	Tradeweb Markets Inc	148.49	Financial Services Sector	Capital Markets
AXP	American Express Co	275.25	Financial Services Sector	Credit Services
COIN	Coinbase Global Inc	182.95	Financial Services Sector	Financial Data & Stock Exchanges

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Sym	Company	trkPrice	Sector	Industry
ARGX	Argenx NV	583.62	Healthcare Sector	Biotechnology
GRAL	GRAIL Inc	26.14	Healthcare Sector	Diagnostics & Research
IQV	IQVIA Holdings Inc	174.37	Healthcare Sector	Diagnostics & Research
ABBV	AbbVie Inc	205.19	Healthcare Sector	Drug Manufacturers - Major
AMGN	Amgen Inc	305.70	Healthcare Sector	Drug Manufacturers - Major
AZN	Astrazeneca Plc	72.22	Healthcare Sector	Drug Manufacturers - Major
BMV	Bristol-Myers Squibb Co	59.60	Healthcare Sector	Drug Manufacturers - Major
MRK	Merck & Co	86.60	Healthcare Sector	Drug Manufacturers - Major
ELV	Elevance Health Inc	429.33	Healthcare Sector	Health Care Plans
UNH	UnitedHealth Group Inc.	523.20	Healthcare Sector	Health Care Plans
ISRG	Intuitive Surgical Inc	507.05	Healthcare Sector	Medical Instruments & Supplies
DAL	Delta Air Lines Inc	43.37	Industrials Sector	Airlines
MWA	Mueller Water Products Inc	26.09	Industrials Sector	Diversified Industrials
CAT	Caterpillar Inc	334.66	Industrials Sector	Farm & Heavy Construction Machinery
DE	Deere & Co	470.90	Industrials Sector	Farm & Heavy Construction Machinery
CAR	Avis Budget Group Inc	76.78	Industrials Sector	Rental & Leasing Services
LECO	Lincoln Electric Hldgs	194.78	Industrials Sector	Tools & Accessories
CRDO	Credo Technology Group Holding I	43.04	Technology Sector	Communication Equipment
ANET	Arista Networks Inc	80.16	Technology Sector	Computer Systems
BE	Bloom Energy Corporation	21.12	Technology Sector	Electronic Components
VRT	Vertiv Holdings LLC	77.11	Technology Sector	Electronic Components
EA	Electronic Arts Inc	144.87	Technology Sector	Electronic Gaming & Multimedia
IBM	International Business Machines C	249.98	Technology Sector	Information Technology Services
LDOS	Leidos Holdings Inc	142.94	Technology Sector	Information Technology Services
DASH	DoorDash Inc	189.25	Technology Sector	Internet Content & Information
GOOGL	Alphabet Inc Class A	157.04	Technology Sector	Internet Content & Information
COHR	Coherent Corp	67.54	Technology Sector	Scientific & Technical Instruments
AMD	Advanced Micro Devices	102.96	Technology Sector	Semiconductors
NVDA	NVIDIA Corporation	110.42	Technology Sector	Semiconductors
RMBS	Rambus Inc	52.68	Technology Sector	Semiconductors
TSM	Taiwan Semiconductor Manufactui	170.39	Technology Sector	Semiconductors

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MSTR	Microstrategy Inc	312.54	Technology Sector	Software - Application
NICE	NICE Ltd	157.70	Technology Sector	Software - Application
SAP	SAP SE	271.42	Technology Sector	Software - Application
TEAM	Atlassian Corporation	223.96	Technology Sector	Software - Application
CHKP	Check Point Software Technologie	228.01	Technology Sector	Software - Infrastructure
MSFT	Microsoft Corp	382.14	Technology Sector	Software - Infrastructure
PLTR	Palantir Technologies Inc	87.45	Technology Sector	Software - Infrastructure
OKLO	Oklo Inc	22.70	Utilities Sector	Utilities - Regulated Electric
COWZ	Pacer US Cash Cows 100 ETF	54.90		
IEUR	iShares Core MSCI Europe ETF	60.45		
IJR	iShares S&P SmallCap 600 Index	106.35		
JEPI	JPMorgan Equity Premium Income	57.00		
MDY	SPDRs S&P Midcap Trust Series E	544.86		
VFLO	Victory Portfolios II VictoryShares	34.63		
VGK	Vanguard European Etf	70.62		
XBI	SPDR S&P Biotech ETF	80.59		

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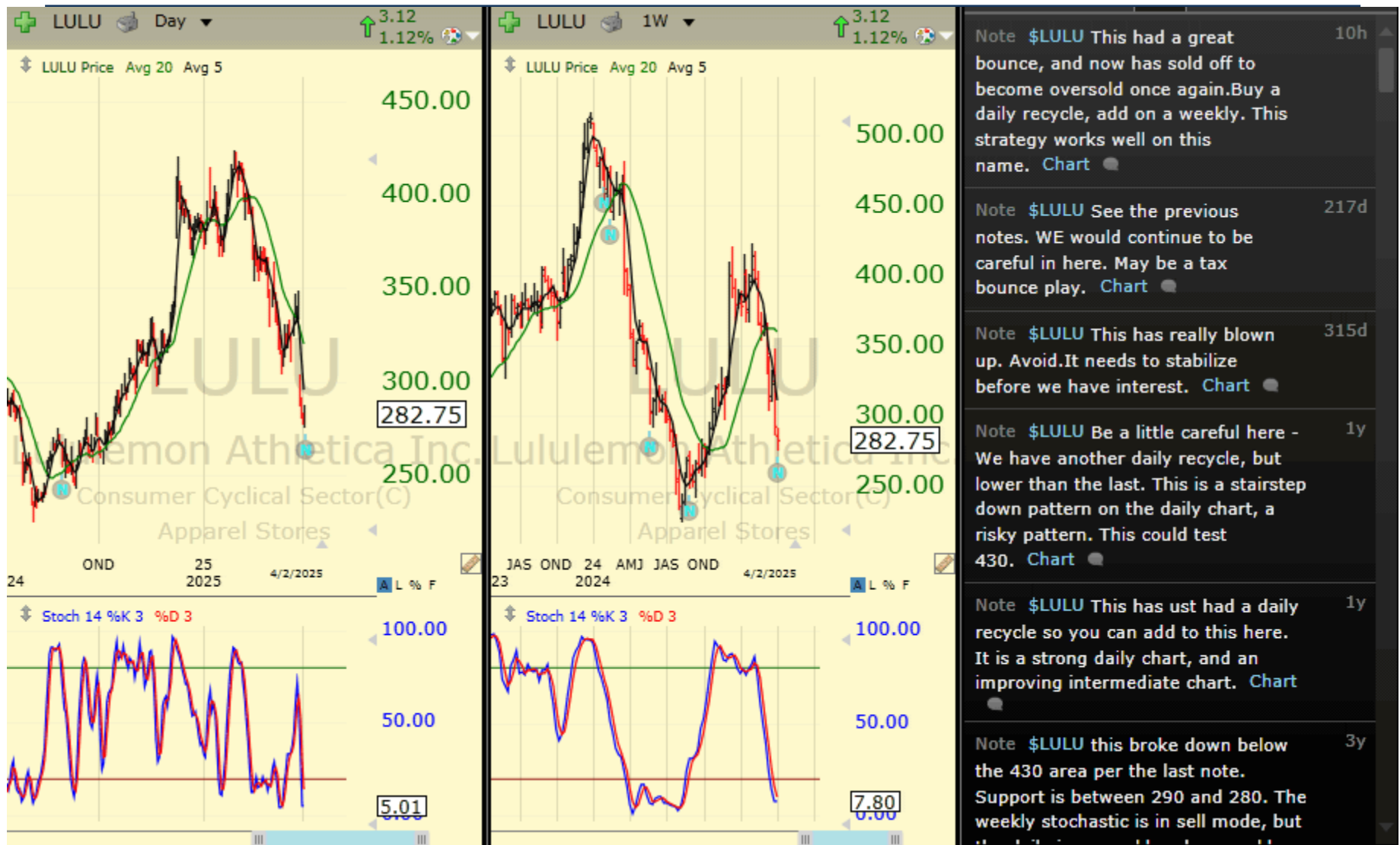
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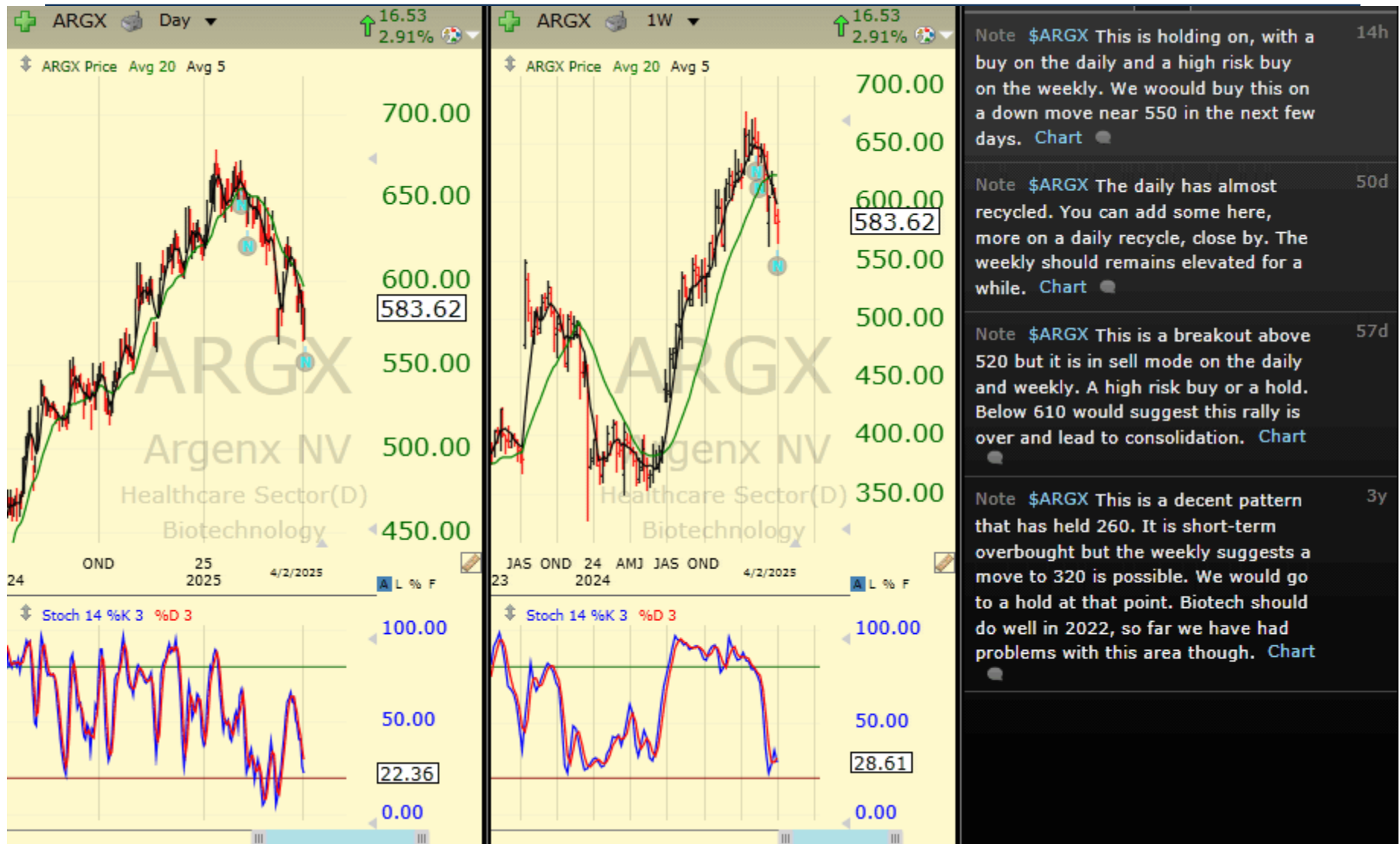
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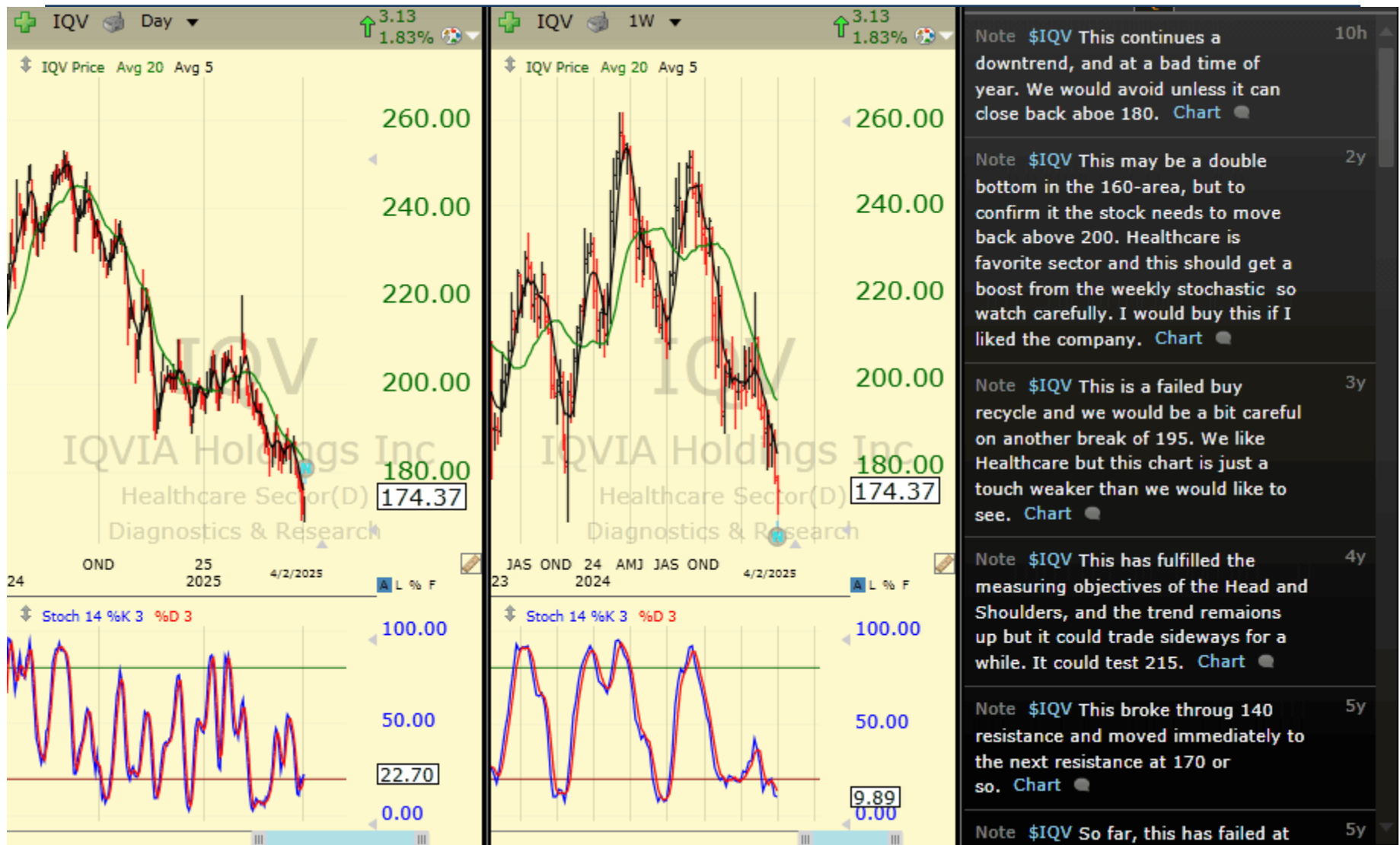
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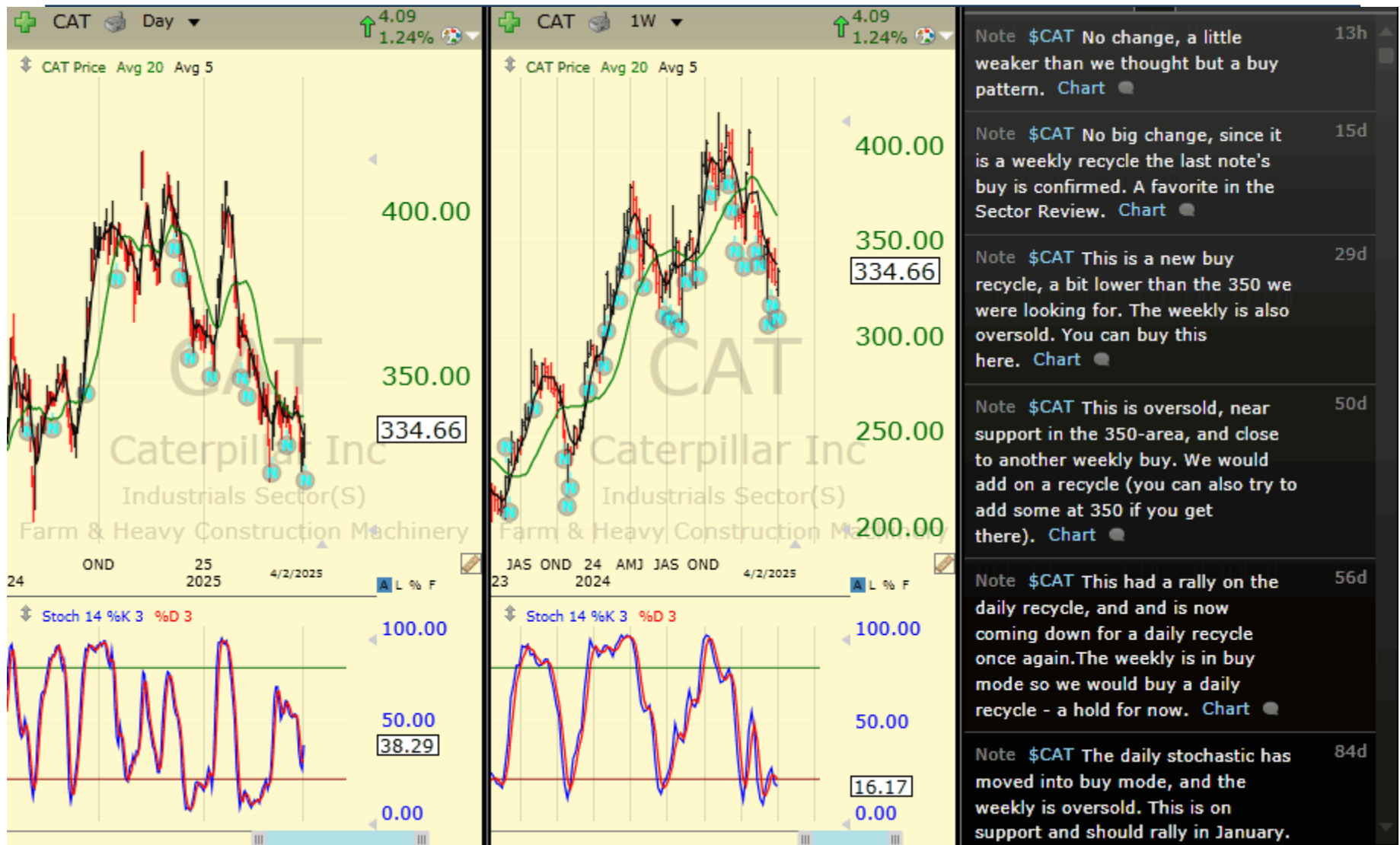
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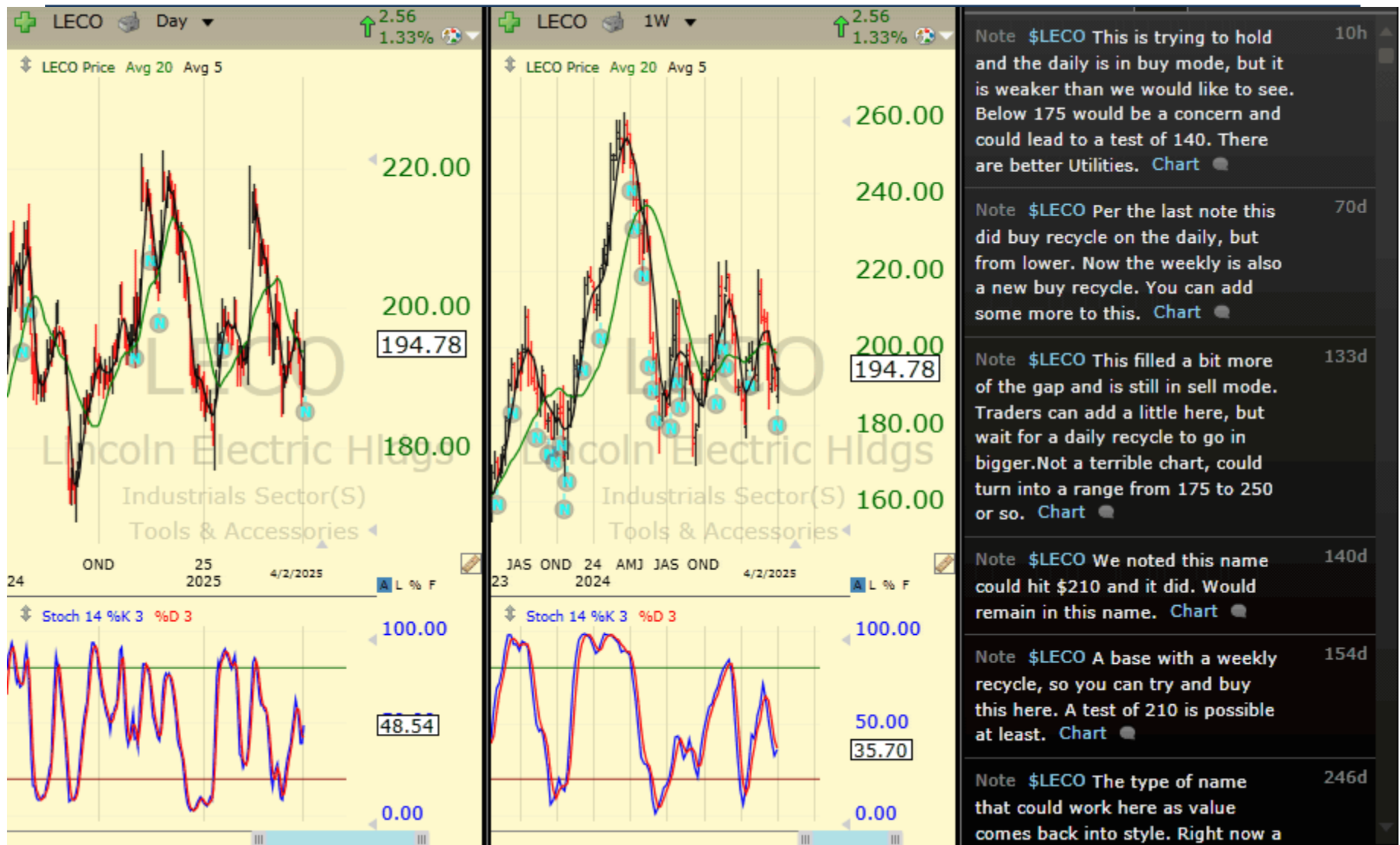
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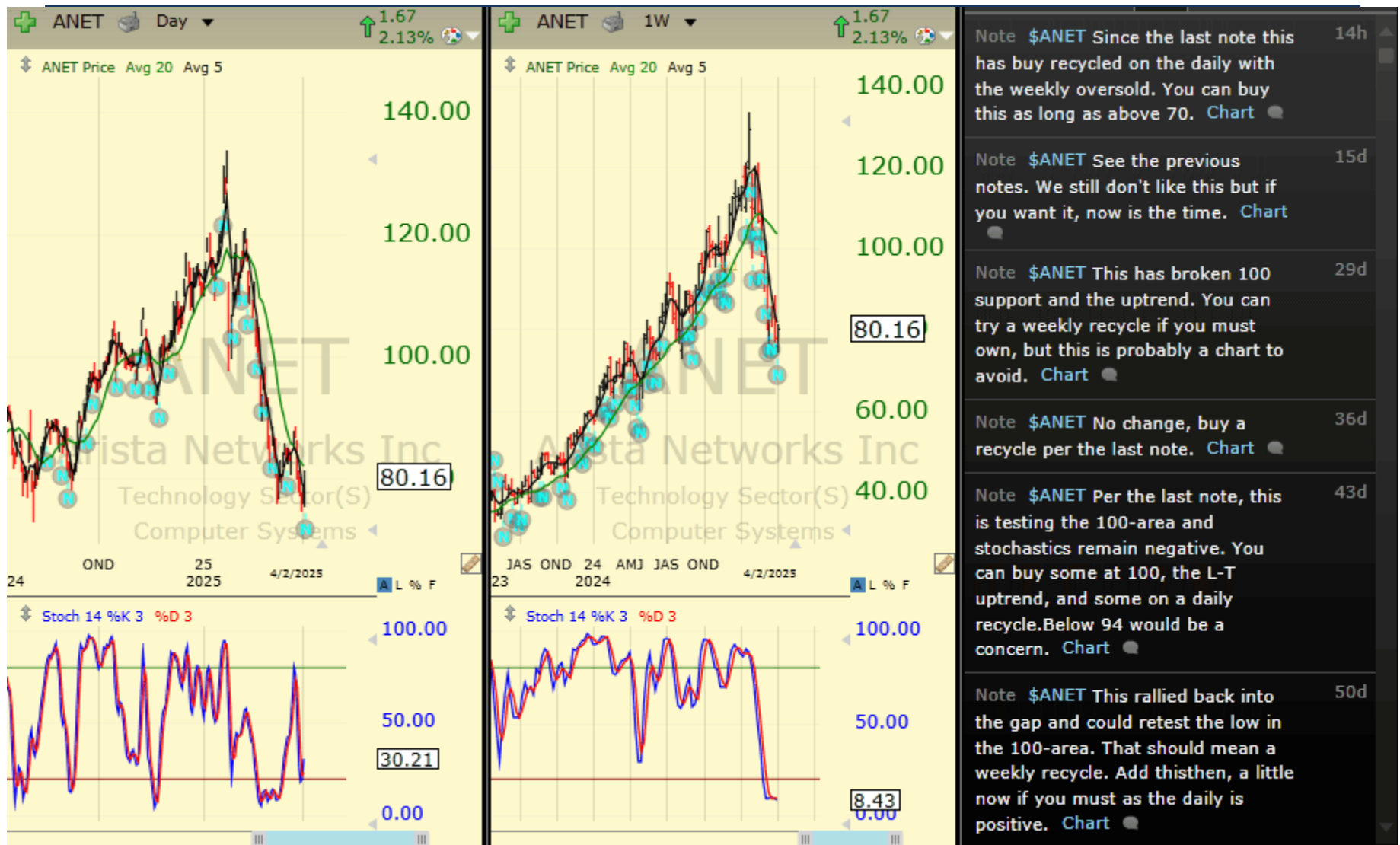
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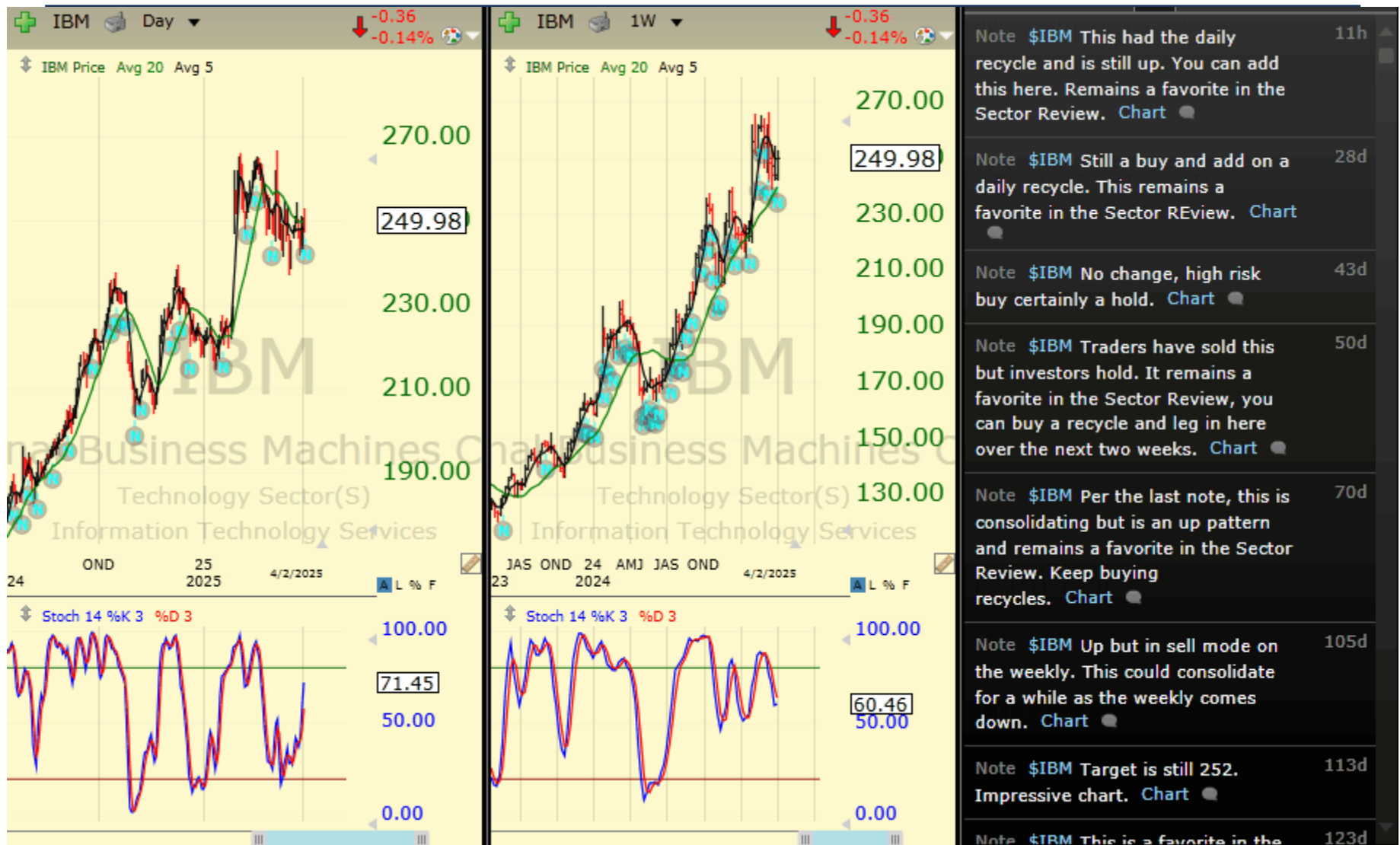
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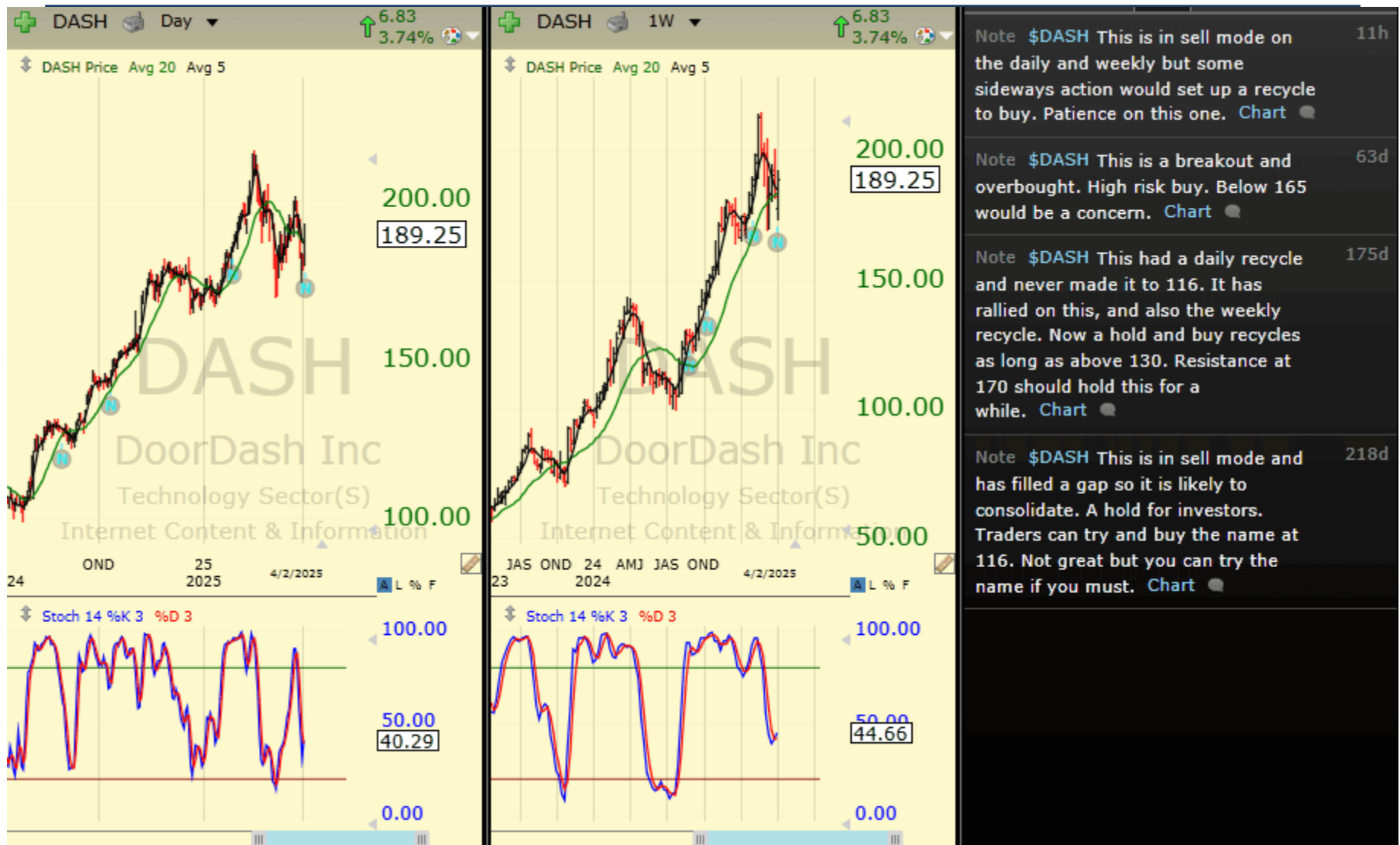
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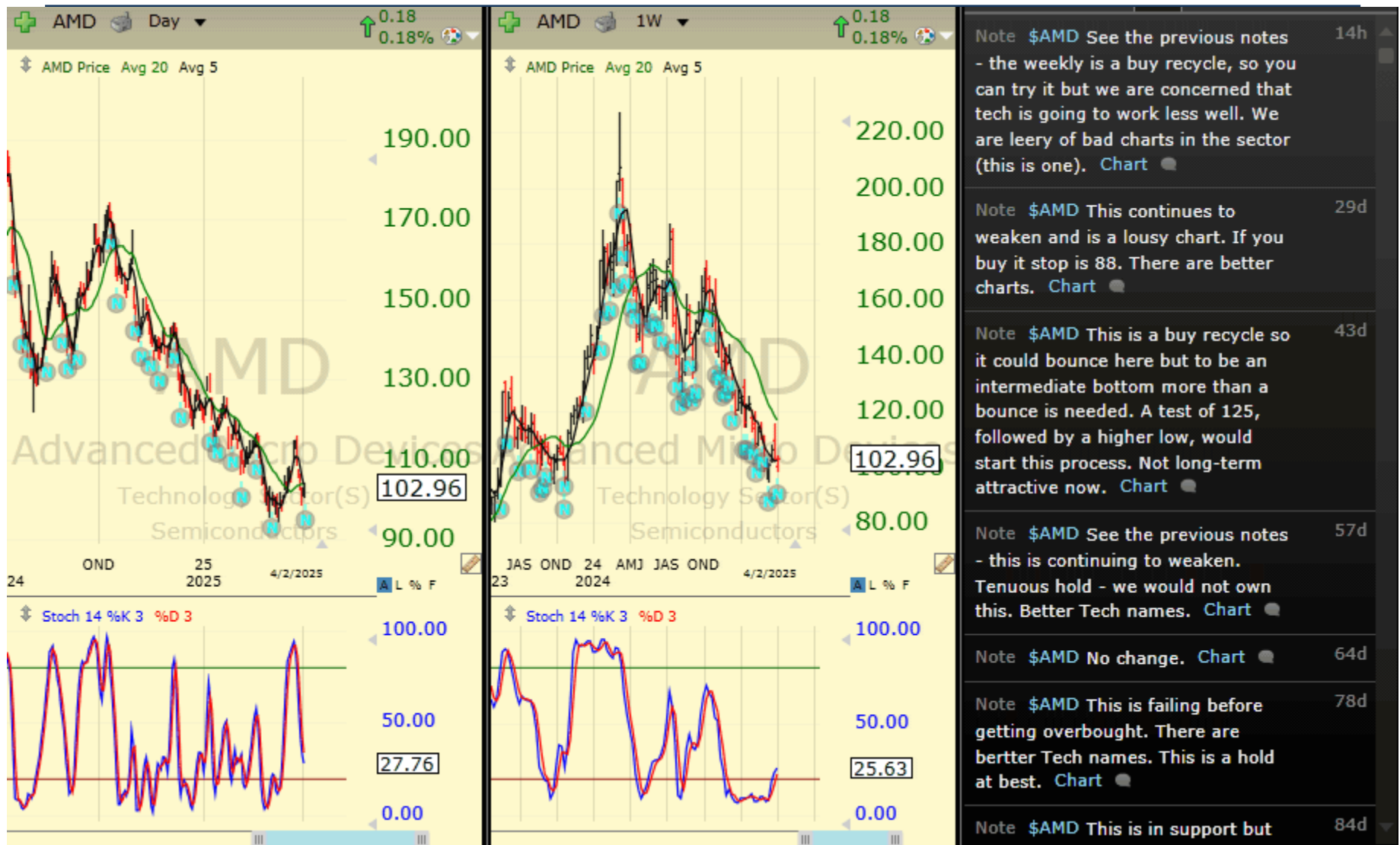
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Technical Indicators

Readers will note that we use the same indicators on all of the charts in this presentation. We append definitions of these indicators and are available via the website: [Education and Training Center](#).

Technicals Defined

Moving Averages:

Moving averages are one of the building blocks of Technical Analysis, and there are almost as many ways to use this indicator as there are technicians.

At the FRED report we teach and use a dual moving average crossover system to determine trend. Our favorites are the 5 period and 20 period moving averages. We consider the trend to be up if the 5 is above the 20, and down if below it.

Stochastics:

The Stochastic Oscillator is one of the commonly used momentum oscillators and is standard on charting programs. There are two lines on the chart below, %K and %D.

%K is the faster of the two lines, and represents a mathematical formula that *measures where the current close is in relation to the trading range of the last "X" periods of time*. We use a 14 period look-back, so in plain English %K says where the current close is in the trading range of the last 14 days, expressed as a %.

At the FRED report we use it somewhat differently than is commonly taught. The standard way to use the indicator is to register a buy signal when it moves below, and then above, 20 (the lowest 20% of closing prices in the last 14 days). A sell signal is when the indicator moves above, and then below 80 (the highest 80% of closes over the last 14 days).

The other line, %D, is a 3 period moving average of %K. We have found that the Stochastic is sensitive, so we advocate taking signals only in the direction of the trend. When looking at the standard FRED report chart, this would mean taking buy signals when the 5 is above the 20, and sell signals when the 5 is below the 20, but using a different technique to exit positions. The reason for this is the Stochastic is quite sensitive, and can give early indications, especially in new trends. It also can get "stuck" in the direction of trends, which connotes strength and not weakness. Another, preferred interpretation, is to use the indicator to measure risk. An example: buy in an uptrend, not when the stochastic is at 90% but rather wait until it falls below 50%. This way, even if a stock, commodity, or ETF does not give one of the "classic" signals, you can still use the indicator to assess risk, and leg into positions.

The FRED Report

Financial Research, Education & Data

The FRED Report (www.theFREDreport.com) was started to provide Financial Advisors and investors access to unbiased market research. The President of The Fred Report, **Fred Meissner, CMT** has been practicing Technical Market Analysis since 1983 and has worked in the research departments of Merrill Lynch and Robinson – Humphrey /Smith Barney. In addition he has served the public as a portfolio manager and financial advisor. We know the problems investors face and have devoted our career to helping find the best possible investments in all environments.

