

Chartbook Review

(charts as of 04/09/2025)

Most Requested Names:

RJF, TSLA, APO, BX

The FRED Report

4514 Chamblee-Dunwoody
Dunwoody, GA 30338

Web:

www.theFREDreport.com

Phone: 404-875-FRED

fred@thefredreport.com

By Fred Meissner, CMT

www.theFREDreport.com

Chartbook: Stocks of Interest

Sym	Company	trkPrice	Sector ▲	Industry
TT	Trane Technologies	342.52	Basic Materials Sector	Building Materials
FCX	Freeport-McMoran Inc	33.71	Basic Materials Sector	Copper
TSLA	Tesla Inc	272.00	Consumer Cyclical Sector	Auto Manufacturers
BIRK	Birkenstock Holding plc	48.13	Consumer Cyclical Sector	Footwear & Accessories
NFLX	Netflix Inc	944.07	Consumer Cyclical Sector	Media - Diversified
AMZN	Amazon.Com Inc	190.95	Consumer Cyclical Sector	Specialty Retail
BABA	Alibaba Group Holding Ltd	104.94	Consumer Cyclical Sector	Specialty Retail
MELI	MercadoLibre Inc	1979.41	Consumer Cyclical Sector	Specialty Retail
ADM	Archer Daniels Midland	44.37	Consumer Defensive Sector	Farm Products
PTEN	Patterson-UTI Energy Inc	6.57	Energy Sector	Oil & Gas Drilling
EQT	Eqt Corporation	50.15	Energy Sector	Oil & Gas E&P
OXY	Occidental Petro Cp	40.23	Energy Sector	Oil & Gas E&P
HAL	Halliburton Co	22.04	Energy Sector	Oil & Gas Equipment & Services
SLB	Schlumberger Ltd	35.94	Energy Sector	Oil & Gas Equipment & Services
CVX	Chevron Corp	146.04	Energy Sector	Oil & Gas Integrated
SHEL	Shell PLC	63.89	Energy Sector	Oil & Gas Integrated
OKE	Oneok Inc	84.81	Energy Sector	Oil & Gas Midstream
TRGP	Targa Resources Corp	173.55	Energy Sector	Oil & Gas Midstream
APO	Apollo Asset Management Inc.	128.42	Financial Services Sector	Asset Management
BX	Blackstone Inc	137.38	Financial Services Sector	Asset Management
BAC	Bank Of America Corp	37.16	Financial Services Sector	Banks - Global
JPM	JPMorgan Chase and Co	234.39	Financial Services Sector	Banks - Global
GS	Goldman Sachs Group Inc	516.67	Financial Services Sector	Capital Markets
HOOD	Robinhood Markets Inc Class A	42.21	Financial Services Sector	Capital Markets
MRX	Marex Group plc	40.08	Financial Services Sector	Capital Markets
NMR	Nomura Holdings, Inc. ADS	5.46	Financial Services Sector	Capital Markets
RJF	Raymond James Financial	136.26	Financial Services Sector	Capital Markets
MA	Mastercard Incorporated	515.24	Financial Services Sector	Credit Services

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REGN	Regeneron Pharm Inc	575.52	Healthcare Sector	Biotechnology
IQV	IQVIA Holdings Inc	157.00	Healthcare Sector	Diagnostics & Research
ABBV	AbbVie Inc	179.58	Healthcare Sector	Drug Manufacturers - Major
GILD	Gilead Sciences Inc	105.05	Healthcare Sector	Drug Manufacturers - Major
JNJ	Johnson & Johnson	150.89	Healthcare Sector	Drug Manufacturers - Major
MRK	Merck & Co	81.88	Healthcare Sector	Drug Manufacturers - Major
UNH	UnitedHealth Group Inc.	578.21	Healthcare Sector	Health Care Plans
ISRG	Intuitive Surgical Inc	522.17	Healthcare Sector	Medical Instruments & Supplies
KTOS	Kratos Defense & Sec Sol. Inc.	31.79	Industrials Sector	Aerospace & Defense
RTX	RTX Corporation	128.41	Industrials Sector	Aerospace & Defense
DAL	Delta Air Lines Inc	44.27	Industrials Sector	Airlines
MMM	3M Company	138.22	Industrials Sector	Conglomerates
GE	GE Aerospace	187.17	Industrials Sector	Diversified Industrials
MWA	Mueller Water Products Inc	24.85	Industrials Sector	Diversified Industrials
CAT	Caterpillar Inc	301.03	Industrials Sector	Farm & Heavy Construction Machinery
DE	Deere & Co	452.75	Industrials Sector	Farm & Heavy Construction Machinery
EQIX	Equinix Inc	797.43	Real Estate Sector	REIT - Diversified
WY	Weyerhaeuser Co	26.55	Real Estate Sector	REIT - Diversified
STX	Seagate Technology Holdings PLC	74.28	Technology Sector	Computer Systems
BE	Bloom Energy Corporation	17.86	Technology Sector	Electronic Components
VRT	Vertiv Holdings LLC	72.91	Technology Sector	Electronic Components
EA	Electronic Arts Inc	136.55	Technology Sector	Electronic Gaming & Multimedia
IBM	International Business Machines C	235.31	Technology Sector	Information Technology Services
GOOG	Alphabet Inc	161.09	Technology Sector	Internet Content & Information
META	Meta Platforms Inc	584.71	Technology Sector	Internet Content & Information
BMI	Badger Meter Inc	184.44	Technology Sector	Scientific & Technical Instruments
ASML	Asml Hldgs Nv Ny Reg Shs	687.52	Technology Sector	Semiconductor Equipment & Materials

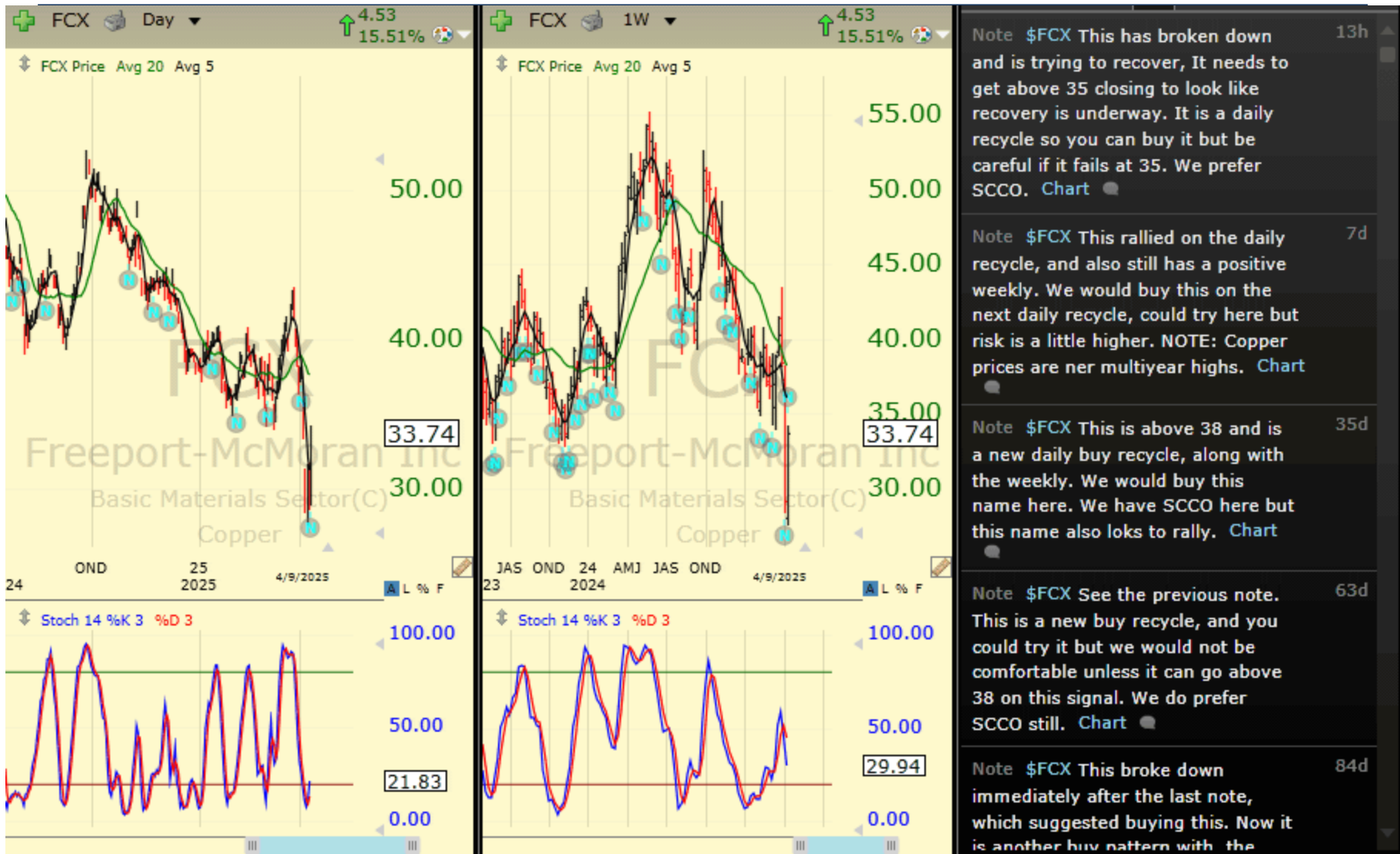
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AVGO	Broadcom Inc	185.01	Technology Sector	Semiconductors
INTC	Intel Corp	21.49	Technology Sector	Semiconductors
NVDA	NVIDIA Corporation	114.25	Technology Sector	Semiconductors
TSM	Taiwan Semiconductor Manufactu	158.66	Technology Sector	Semiconductors
CRM	Salesforce Inc	265.14	Technology Sector	Software - Application
TEAM	Atlassian Corporation	209.62	Technology Sector	Software - Application
TTD	The Trade Desk Inc	54.11	Technology Sector	Software - Application
MSFT	Microsoft Corp	390.64	Technology Sector	Software - Infrastructure
PLTR	Palantir Technologies Inc	91.93	Technology Sector	Software - Infrastructure
SO	Southern Company The	87.78	Utilities Sector	Utilities - Regulated Electric
COPX	Global X Copper Miners Etf	34.95		
IIM	Invesco Value Municipal Income T	11.58		
PPA	Invesco Aerospace & Defense Port	115.49		
PSCE	Invesco S&P SmallCap Energy ETF	35.71		
QQQ	Invesco QQQTrust Ser 1	465.14		

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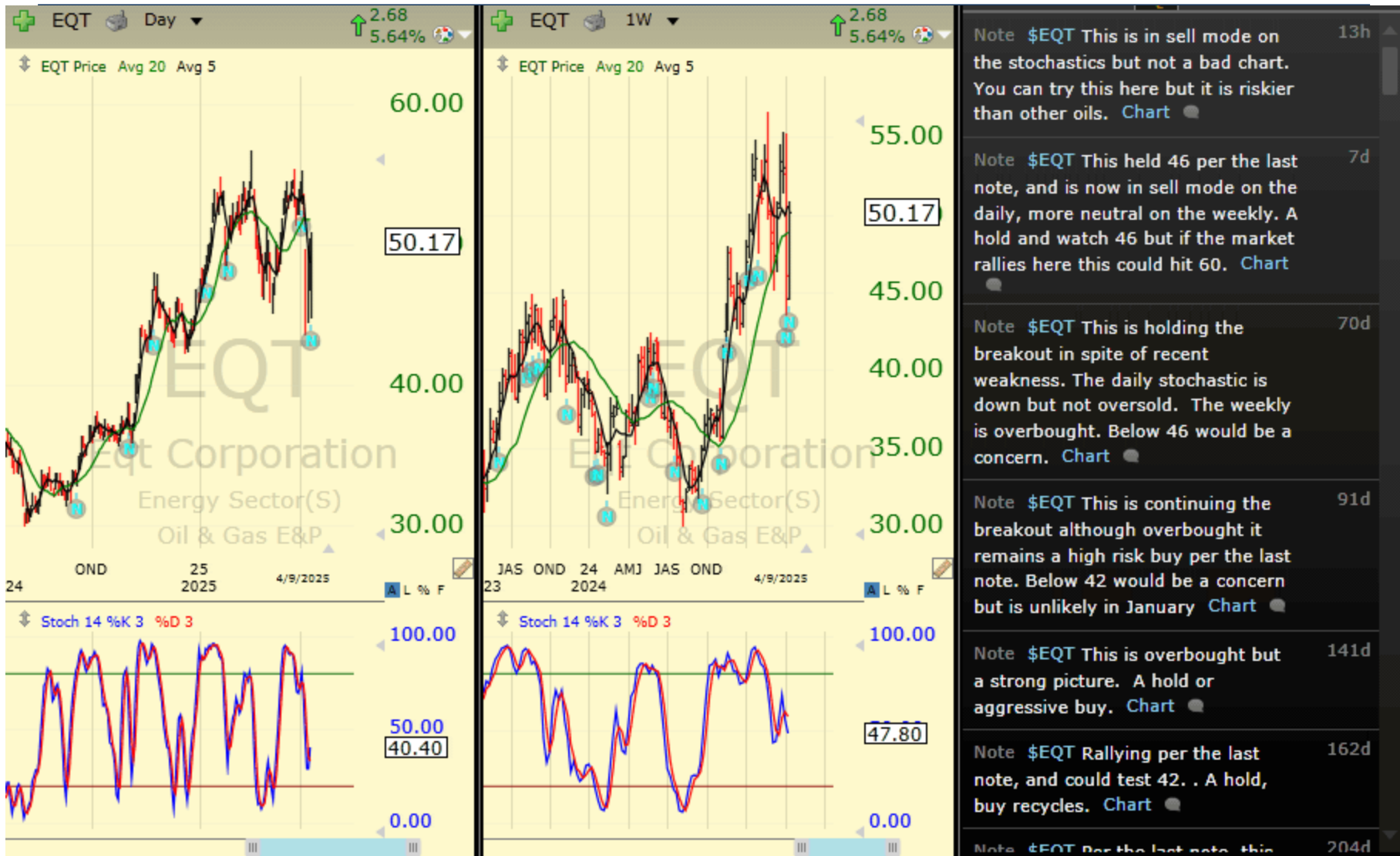
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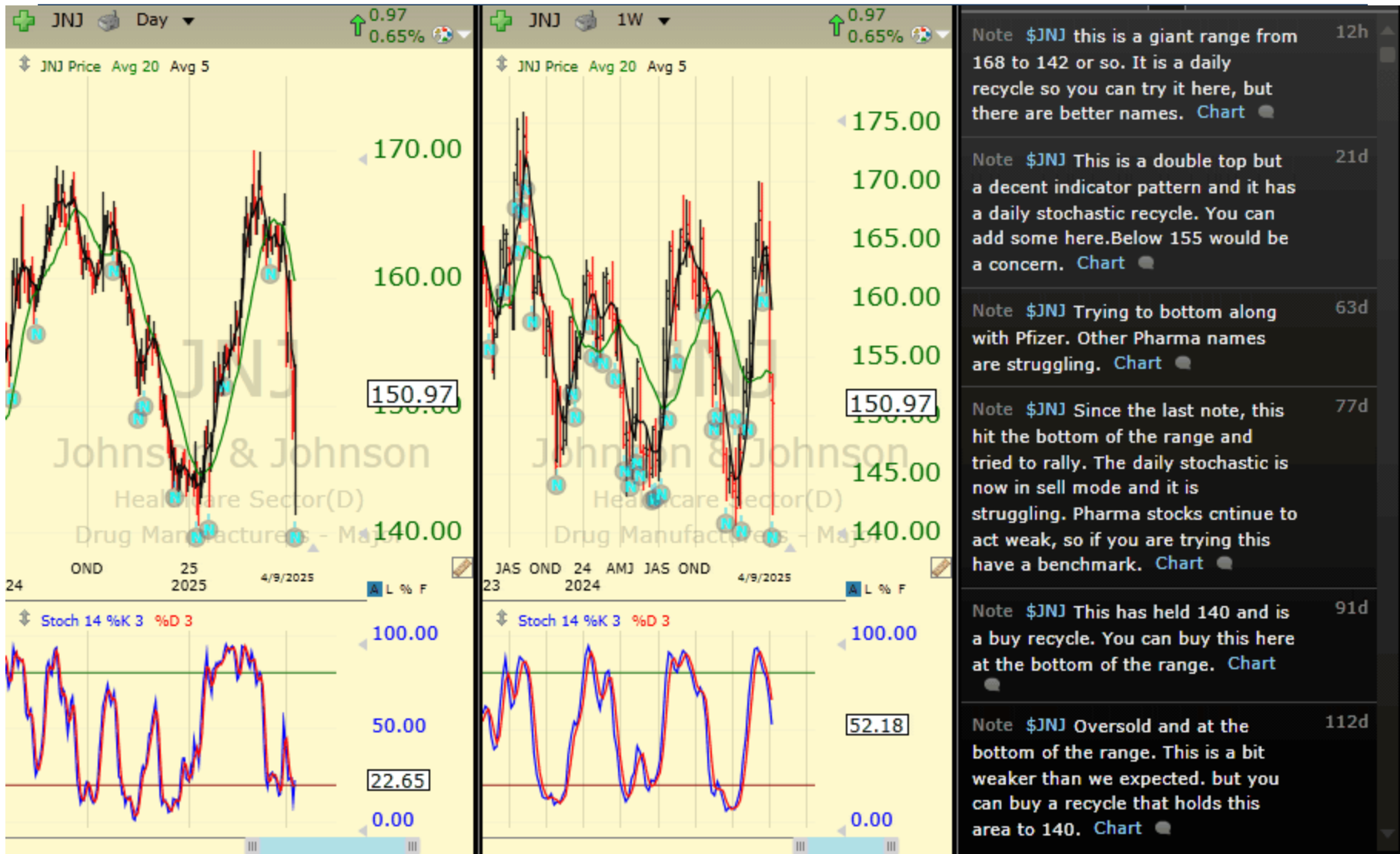
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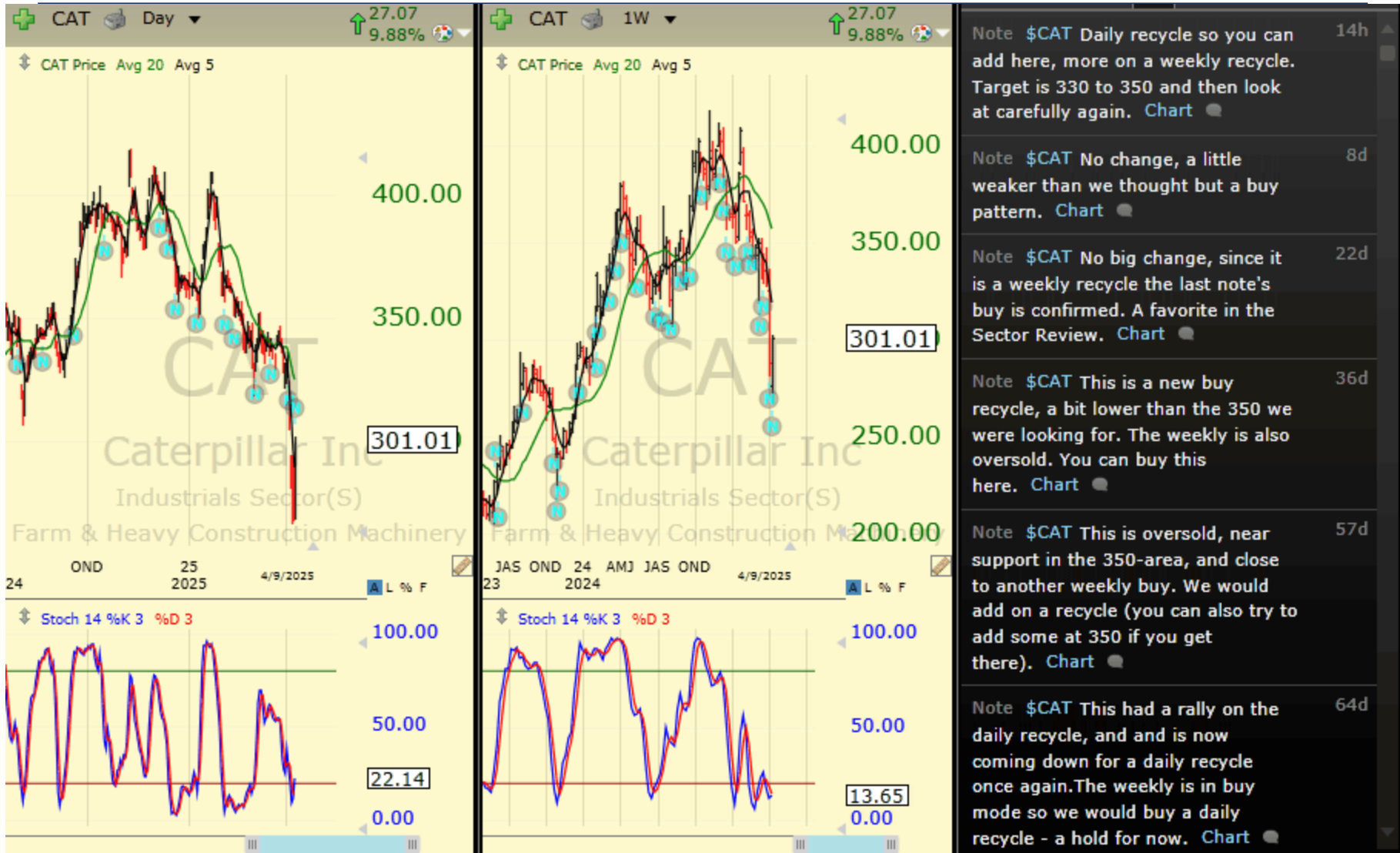
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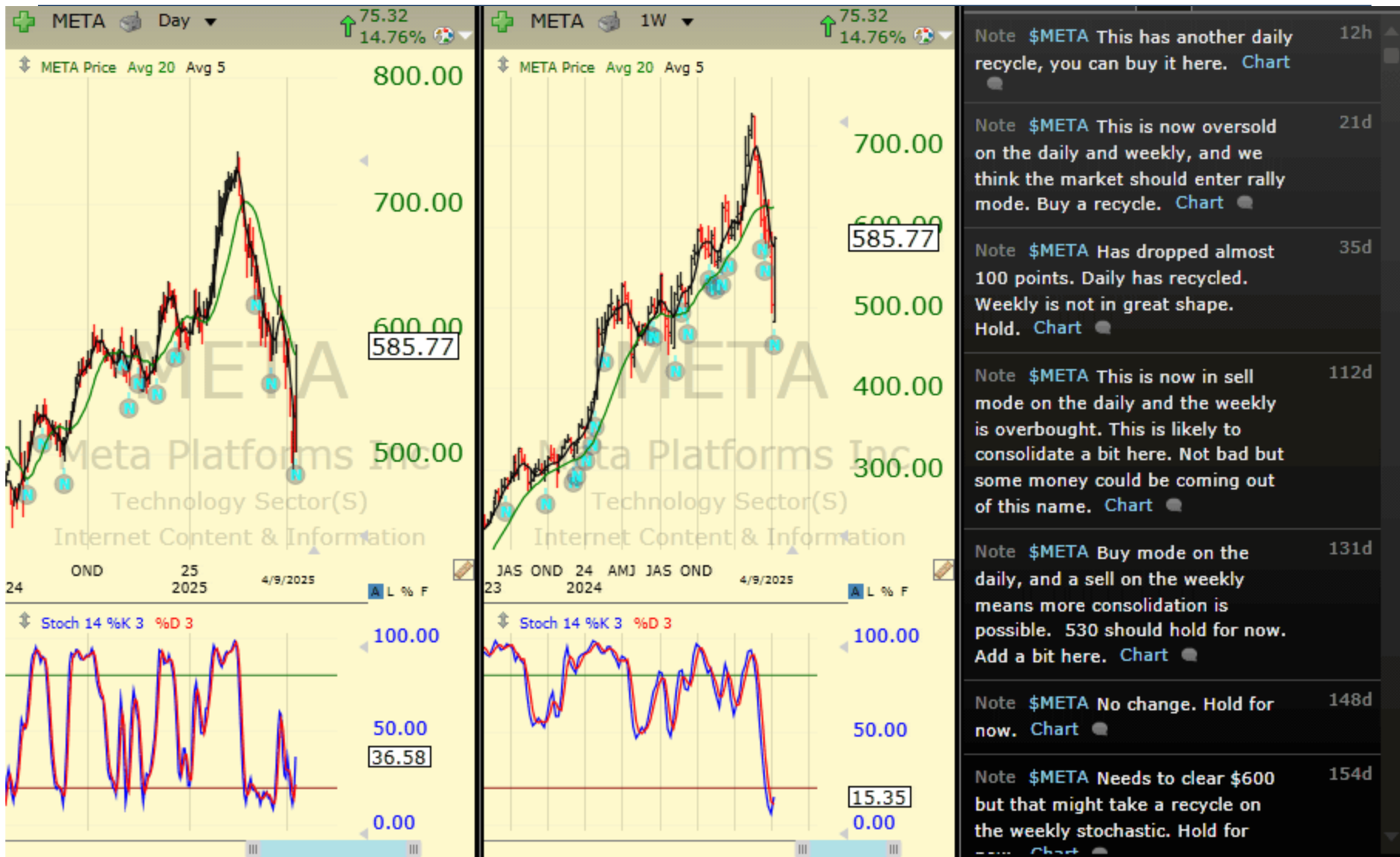
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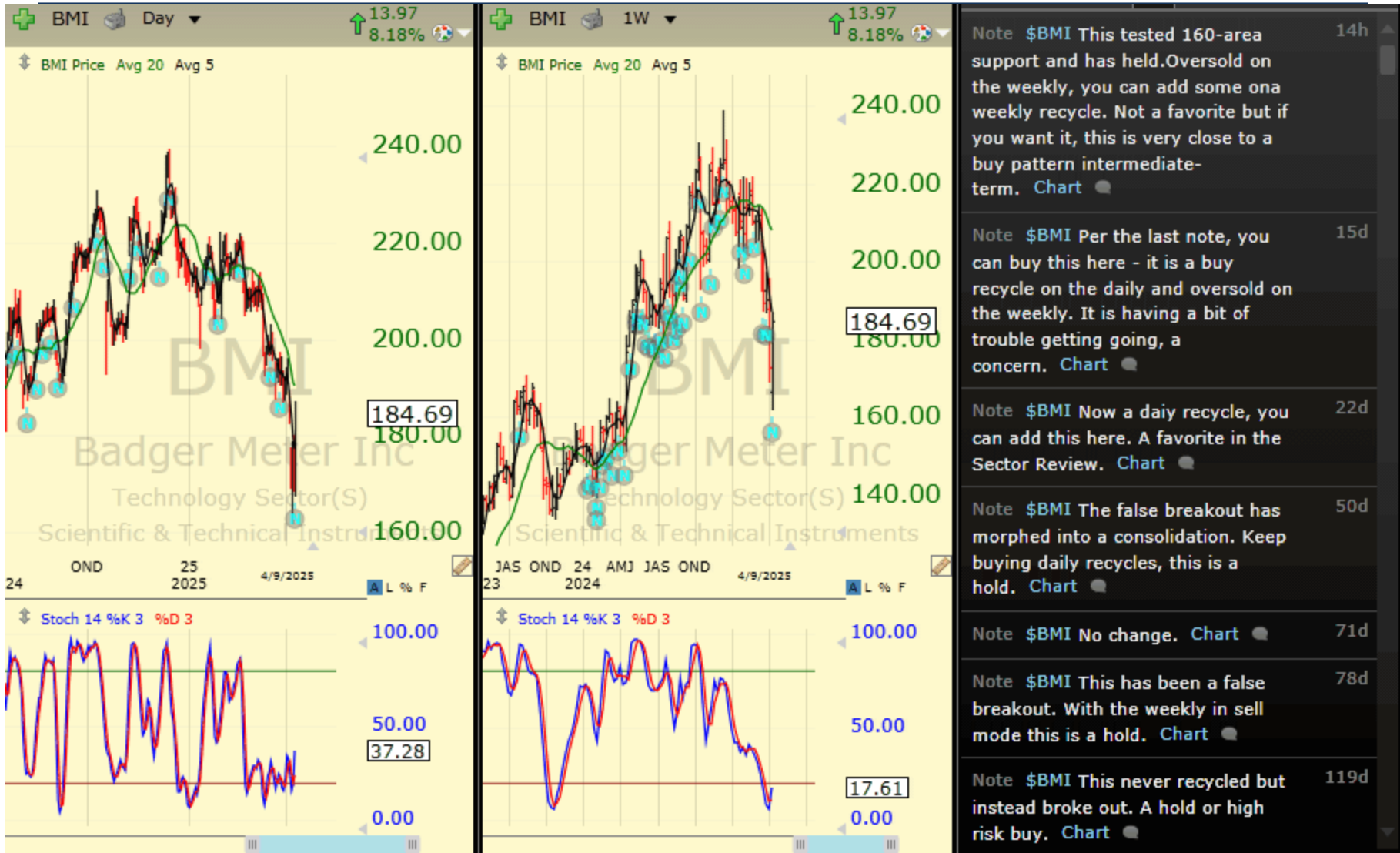
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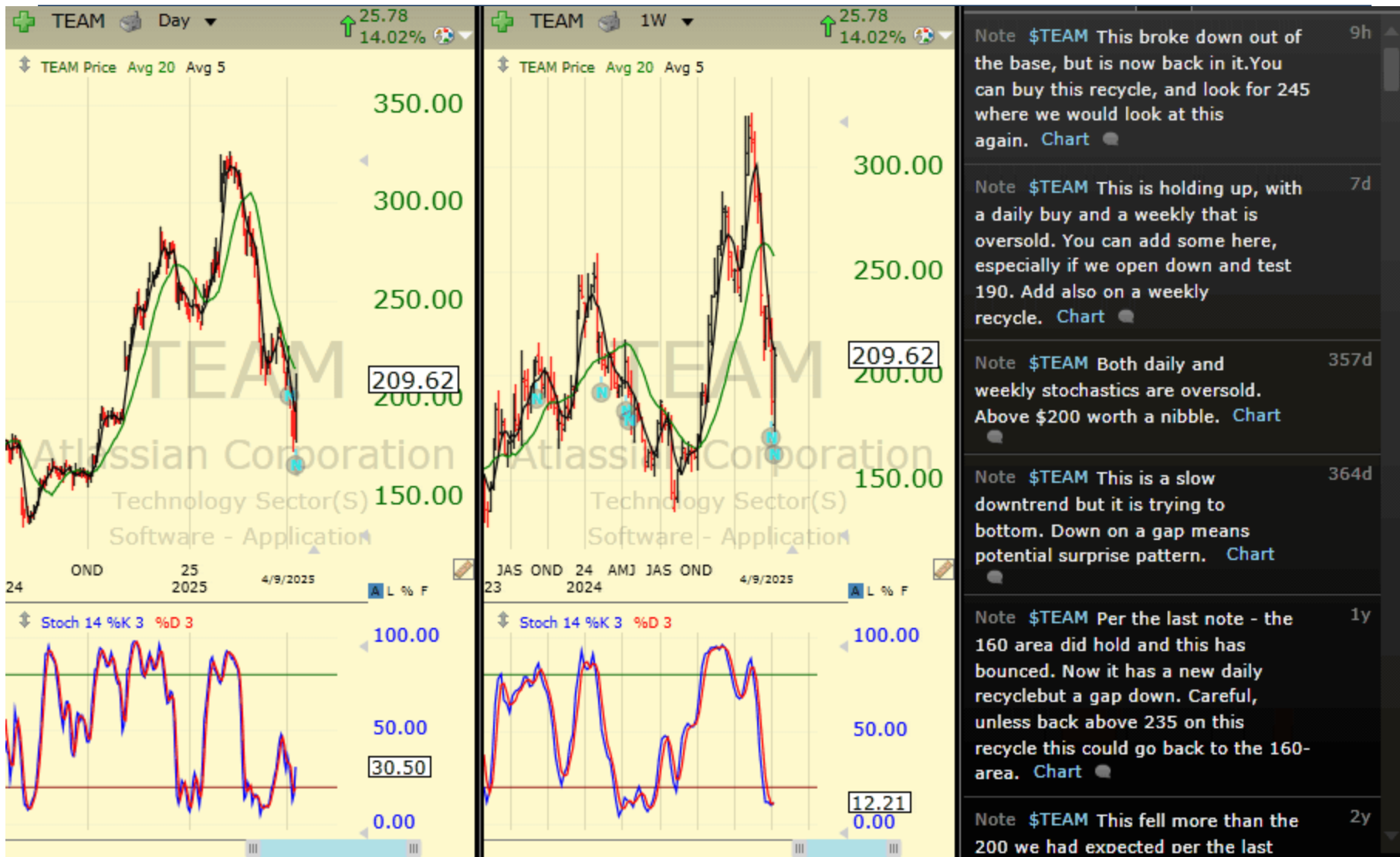
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Technical Indicators

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.

