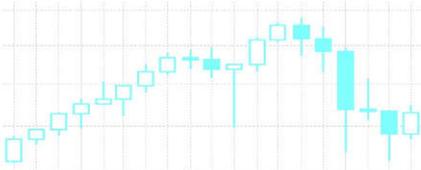


for: BullCharts User Group
and U3A (Manningham)
Stockmarket group (2014)

Position sizing



Robert Brain for ATAA Brisbane
June 2022



"The share market can seem mystical and almost like black magic; but with the right support and assistance, it just seems like magic."
Robert Brain

© Copyright 2014-2022, Robert B. Brain, *Brainy's Share Market Toolbox* — www.robertbrain.com C-Revision: 2

This presentation

This presentation was presented to the ATAA Brisbane webinar in June 2022, and was originally delivered to the U3A Manningham (Stockmarket Group) in March 2014 (ref 2014-03-02).

The subject of *position sizing* has been raised in our BullCharts User Group meetings in the last few months, in discussion about the "\$100k Portfolio", and many of these slides were developed and presented to the user group meetings.



Introduction & Housekeeping

Position size?

When trading / investing in shares:

- 1) Should we use a fixed position size every time (ie. same dollar amount)?
- 2) Is there a minimum position size to use (ie. minimum dollar value)?
- 3) Is there a maximum position size to use?
- 4) Does it matter?

2

Carefully consider these questions

Let's think about this for a moment, before turning to the next slides.

You might be surprised at the answers.

In short, there can be significant benefits to doing some clever position sizing.

How? Why? Not convinced?

The answers to this are included in the following slides.