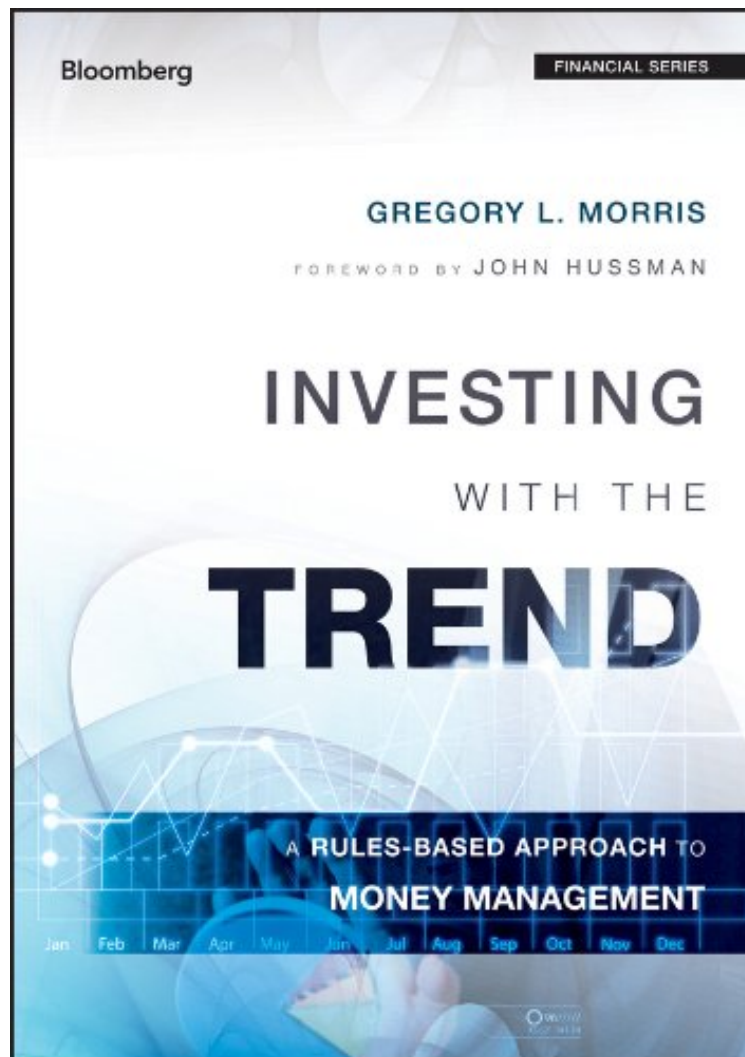


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## Investing with the Trend: A Rules-based Approach to Money Management (Bloomberg Financial)

*Gregory L. Morris*

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**Gregory L. Morris : Investing with the Trend: A Rules-based Approach to Money Management (Bloomberg Financial)** before purchasing it in order to gage whether or not it would be worth my time, and all praised Investing with the Trend: A Rules-based Approach to Money Management (Bloomberg Financial):

5 of 6 people found the following review helpful. ... finished Morris' "Candlestick Charting Explained" and found it incredibly useful. The data and research that went into the .By Maxon A. BrunoI recently finished Morris' "Candlestick Charting Explained" and found it incredibly useful. The data and research that went into the book was extremely useful. However, I wanted to combine Japanese Candlestick signals with solid trend analysis, and found this

book. Since I was impressed with the author previously, I decided to buy this book. Don't get me wrong, it was an impressive book and I certainly learned a lot from it. However, the book was not at all what I expected. I wanted this book to provide me with general tips about trends, reversals, etc, but quickly learned it barely does so. The first two parts seemed to provide more practical information, even if it was about 'the world of finance' and the dangers that exist within it. I thought Parts I and II would be unimportant, while Part III would provide the meat (the whole reason why I bought the book). Yet I found the opposite to be true. Parts I and II confirmed that technical analysis is superior and extremely important. I already knew this, but still appreciated the evidence the author provides to back it all up. Part III was disappointing to me. He appears to discuss the usefulness of the popular indicators, and right when it gets interesting, he talks about binary indicators and compound measuring. I felt that these two topics weren't adequately discussed, because I'm still struggling to add these indicators on my software. I feel like you get a nice introduction to indicators, and then suddenly you're tossed into a confusing lecture. It's almost like Morris is the patient instructor, careful to explain and anticipate your questions, in Parts I, II, and the first part of III, and then becomes the technical, dry, lecturing professor who is teaching grad students. I felt like a freshman college student expecting an intro class, but being surrounded by grad students who are already masters in the field. I felt like I should be having 'Aha!' moments, but didn't. The point: This book is not for beginners. Parts I and II are insightful and easy to follow, but Part III will leave you scrambling for outside sources just to begin to understand what he's talking about. I didn't learn a strategy at all, partly because he doesn't explain how to set up these binary indicators and compound measures. All the charts after that point use them, which made following him even that more difficult. I am thankful, however, that Morris recommends reading "Technical Analysis" by Kirkpatrick. Perhaps after reading this book, I'll be able to piece together Morris' "Dancing with the Trend" strategy. I give the book 3 stars because of how the lack of 'flow', strategy, and explanations in Part III, which is the main reason why people by the book. Other than that, it was insightful. 2 of 2 people found the following review helpful. Philosophically useful By Ol' Jon The author presents a philosophically persuasive plan that is worth considering. I do wish there was a link somewhere to at least a few of his formulas, but I guess I can understand him not giving away the store. It is somewhat pricey for what is delivered, though, in my opinion. 0 of 0 people found the following review helpful. There are some very good comments about market trends By Customer There are some very good comments about market trends, However, all the stats are a bit overpowering. I have not yet completely read the book, but hope that after completion I will be able to put some of the information to good use.

Investing with the Trend provides an abundance of evidence for adapting a rules-based approach to investing by offering something most avoid, and that is to answer the "why"; one would do it this way. It explains the need to try to participate in the good markets and avoid the bad markets, with cash being considered an asset class. The book is in three primary sections and tries to leave no stone unturned in offering almost 40 years of experience in the markets. Part I – The focus is on much of the misinformation in modern finance, the inappropriate use of Gaussian statistics, the faulty assumptions with Modern Portfolio Theory, and a host of other examples. The author attempts to explain each and offer justification for his often strong opinions. Part II – After a lead chapter on the merits of technical analysis, the author offers detailed research into trend analysis, showing how to identify if a market is trending or not and how to measure it. Further research involves the concept of Drawdown, which the author adamantly states is a better measure of investor risk than the oft used and terribly wrong use of volatility as determined by standard deviation. Part III – This is where he puts it all together and shows the reader all of the steps and details on how to create a rules-based trend following investment strategy. A solid disciplined strategy consists of three parts, a measure of what the market is actually doing, a set of rules and guidelines to tell you how to invest based upon that measurement, and the discipline to follow the strategy

... make Greg's Investing with the Trend your next book purchase ... and in light of the current market action, the sooner the better. – Advisor Perspectives From the Inside Flap In this must-have resource, author Gregory Morris – Chairman of the Investment Committee for Stadion Money Management – draws on his years of experience to offer a process for analyzing the present state of the marketplace in order to maximize investment possibilities. Throughout the book, Morris presents compelling evidence that debunks commonly held investing myths that typically hold investors back. Filled with practical examples, and based on solid research and data, Investing with the Trend explains why all too often well-accepted theories on finance, economics, and the market in general can keep investors from reaching their investing goals. Morris's approach, which he skillfully implemented while Stadion's Chief Technical Analyst, is designed to help investors capture most of the market's good times while avoiding the bad. To get started with the process, Morris outlines four essential indicator types and defines the most common investing terms. In clear language, he describes this rules-based technical approach to investing that consistently outperforms market averages. Engaging and informative, Investing with the Trend offers an insider's view of how to evaluate the market through a variety of technical indicators. As Morris explains, each indicator is assigned a weight based on its history as a driver of returns. To maximize

investment potential, Morris advises that investors adjust their portfolio exposure from cash and fully invest in response to the aggregate value of the indicators. This method has consistently provided better returns than a buy-and-hold approach and without taking on extra risk. In contrast with modern investment theory, which equates risk with volatility, Morris equates risk with portfolio drawdown—a distinction that is the foundation of his entire investing approach. As the title implies, this important book reveals that markets tend toward trendiness and that technical analysis, when properly used, can measure the trend of the market at any point in time. Sure to be any investor's key to financial success and backed by the author's investment performance, *Investing with the Trend* provides an innovative way to use technical analysis to minimize risk and outperform market averages.

From the Back Cover  
Praise for *Investing with the Trend* "If you want to take a master class in financial markets, this is the book for you."  
—Mebane Faber, CIO, Cambria Funds "Greg Morris is a learned scholar, sharp observer, rational thinker, and successful stock market analyst and investor. All these characteristics are displayed in his new book *Investing with the Trend*. It is a gem. His understanding and refutation of many Wall Street myths are brilliant; his evaluation of stock market indicators is well-reasoned; and his investment style and risk avoidance methods superb. Anyone, professional or otherwise, interested in a reasoned, fact-supported, comprehensive book on the stock market should own it."  
—Charles D. Kirkpatrick, CMT, Kirkpatrick Company, Inc. "Anyone wanting to read about technical analysis should read this book first. It is the benchmark book that all other books on the topic should be compared to."  
—Peter Mauthe, Investment Banking "If you invest in stocks without first investing in this book, you are a fool. Well written, documented, and practical, Greg's work is an amazing accomplishment, combining knowledge with wisdom. In my library of thousands of market books, there are only a few 'must reads'. This one has earned that honor."  
—Larry Williams, Trader "The trend is your friend, so make friends with *Investing with the Trend*. Whether you are emotional or disciplined, a numbers nerd or not, Greg will show you how successful investors let the rules rule."  
—Sam Stovall, Chief Equity Strategist, SP Capital IQ