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TOGGLE

Finding Stock Ideas – More, and Faster

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TOGGLE

FINDING STOCK IDEAS - MORE, AND FASTER

November 2021

tog•gle
/'tägel/

verb

1. COMPUTING

switch from one effect, feature, or state to another by using a toggle.
"the play/pause button toggles between those functions"



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(Profitable) Investing is hard work



Finding promising trade ideas regardless of style – day-trading, swing-trading, fundamental – requires a substantial time commitment

- Data is widely available (and often free) but **dispersed across numerous sites** (FinViz, Yahoo Finance, TradingView ...) and still **has to be analyzed before it's useful**
- **News and data changes daily**, often several times intra-day
- **Market data is constantly updating** (prices, volume, positioning)

So how do you follow all this for not one stock, but hundreds? It's like sipping from an ocean with a straw.

CAN'T WE HAVE SOME HELP?



Smart assistants are ubiquitous in our daily lives... Why don't they exist in investing?

- Machines are really good at monitoring and processing **large amounts of information**
- They can **uncover price patterns in assets** around events/data changes
- They can **test each relationship for robustness** ... in seconds
- They can **deliver curated insights** tailored to specific users

CAN SMART MACHINES HELP ACTIVE INVESTORS/TRADERS?



Human intelligence is very good at strategy (the “big picture”) but AI can be helpful with the tactics (the “details”).

For example, a portfolio manager decides they want to be long risk in equities and let the machine highlight the assets that are most undervalued/have strongest momentum.

CAN SMART MACHINES HELP ACTIVE INVESTORS/TRADERS?



Where in the investment process can machines add most value

- Idea generation (“What assets best reflect my thesis?”)
- Hypothesis testing (“Is my hunch/instinct correct?”)
- Asset due diligence (“What am I missing?”)
- Portfolio risk management (“Do I really want to sell here? Should I get out?”)

MACHINES ARE ... GOOD WITH NUMBERS

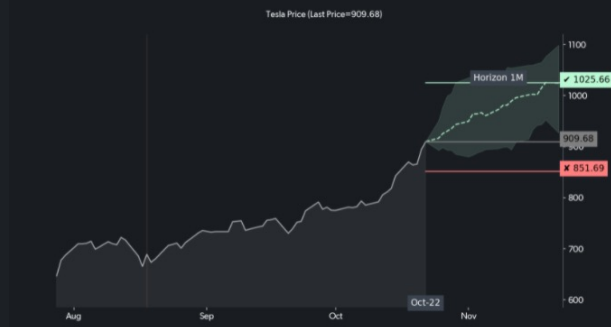


Instead of competing with them, machines can empower users by replicating – fast – the work investors are already doing

TSLA:NASD - Tesla may have 13% upside due to a bullish combination of Analyst Revisions and Analyst Expectations indicators

by Toggle A.I. Oct-25-2021

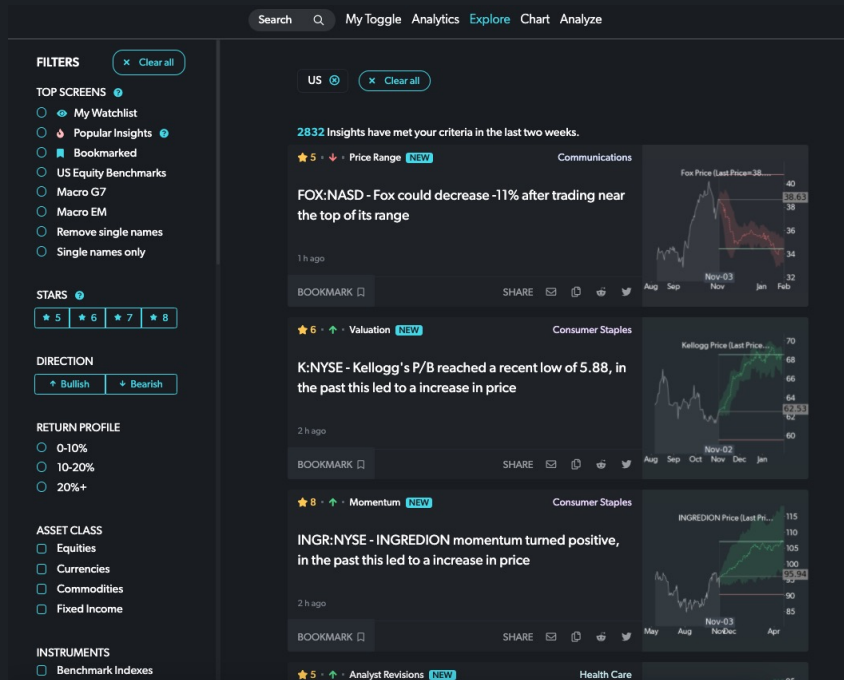
Analyst Revisions indicators for [Tesla](#) are improving. Historically, this led to a median increase in [Tesla](#) price of **13% over the following 1M**, as shown in the chart below. TOGGLE analyzed **4** similar occasions in the past to produce the median projection and the confidence band below ([How do you do this?](#)), most recently on **2021-08-18**. This insight received 5 out of 8 stars ([What are stars?](#)) in our quality assessment.



Source: Toggle

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Machine-generated ideas can connect a view to specific assets that best reflect it

















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LET AI MONITOR ALL YOUR IDEAS AND TRADES



The machine can monitor drivers across thousands of assets you watch

My Securities				All (15)	Portfolio (0)	Watchlist (15)
ALL ASSETS				What's currently moving the asset?		
	AMC AMC Entertainment	\$40.79	+2.00/+5.16%	News Highlight	+2	
	EEM EEM ETF	\$51.10	+0.24/+0.47%			
	GBPUSD GBPUSD	\$1.36	-0.0112/-0.82%			
	GC Gold	\$1,763.90	-25.50/-1.43%			
	HSCEI HSCEI	HK\$8,856.99	-6.84/-0.08%			
	LYFT Lyft	\$49.03	+3.71/+8.19%	Technicals	+3	
	NFLX Netflix	\$688.29	+10.57/+1.56%	News Highlight	+5	
	NKE Nike	\$172.50	+4.67/+2.78%	News Highlight	+3	
	PYPL Paypal	\$230.38	+0.92/+0.40%	Fundamentals	+4	
	US_10Y US TREAS 10Y (USD)	1.579 %	+0.03/+2.07%	Technicals		
	T AT&T	\$25.18	-0.05/-0.20%	News Highlight	+1	
	TAN TAN ETF	\$97.15	-0.15/-0.15%			
	TSLA Tesla	\$1,213.86	+41.86/+3.57%	News Highlight	+2	
	USDJPY USDJPY	¥114.00	+0.0300/+0.03%			

Source: Toggle

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UNDERSTANDING THE STOCK PRICE DRIVERS



Tracking the impact of news and data on stocks

Inflation key challenge as US Fed prepares to remove stimulus

Elon Musk Says Tesla Hasn't Signed Contract With Hertz Despite Earlier Announcement

**Yield Curve Inverts At The Long End,
Are Economic Risks Coming?**

**PayPal Is Exploring a Purchase of
Pinterest**

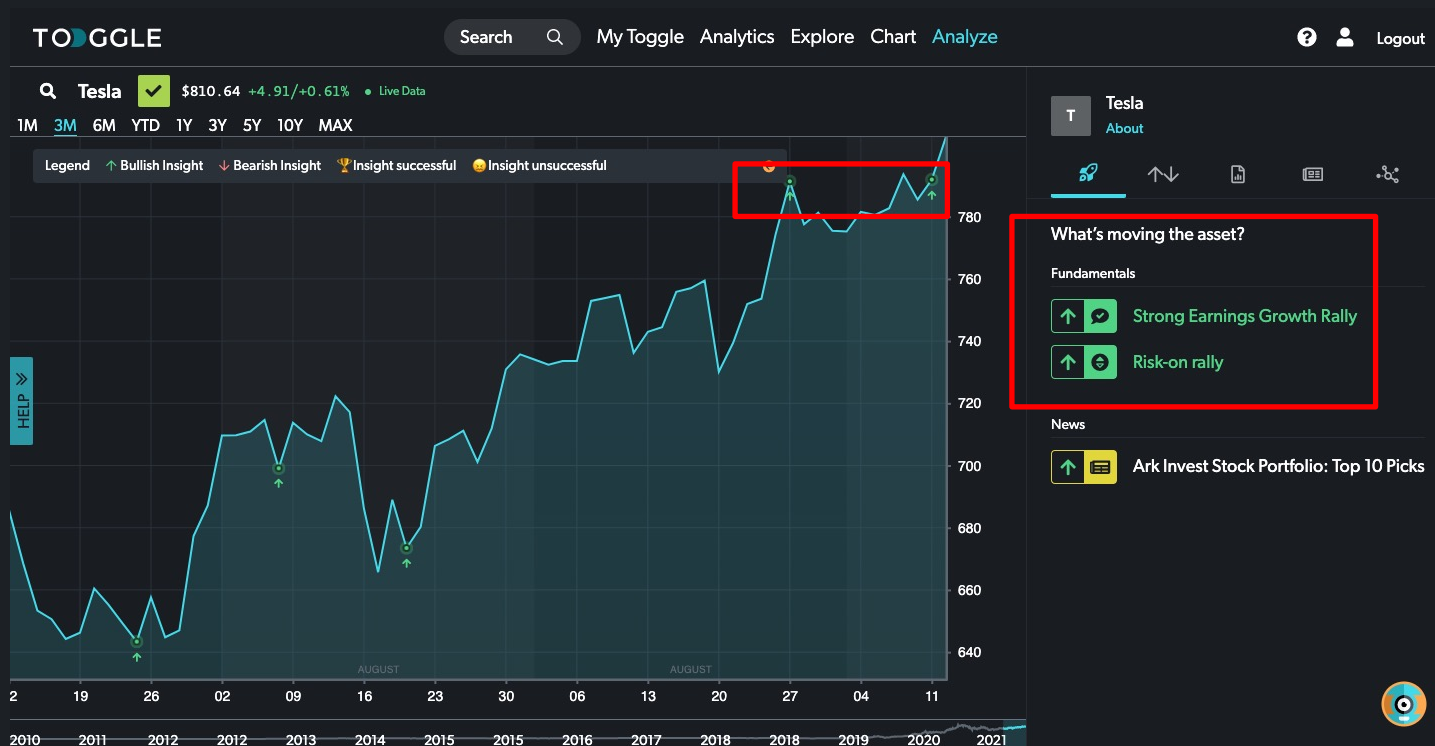
TOGGLE AI PINPOINTS PRICE-MOVING NEWS HEADLINES



Source: Toggle

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TOGGLE HELPS YOU UNDERSTAND THE "WHY"



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CONFIDENTI

LOOK BEFORE YOU LEAP (TRADE)



Machines can help you test your instincts against the data: has the sell-off gone far enough? Historical data can give you a lot of answers.



Source: Toggle

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