

## How To Use The Research Platform

### Step 1 - Housekeeping: Allow for all emails!

Whenever I update something, I send an email. So, when you join, you just need to go to your profile in the upper right corner and click on edit profile. There you also have a contact form for questions, or you can also use my email: [investwithsven@gmail.com](mailto:investwithsven@gmail.com)



When you have clicked on 'Edit Profile', check the box "Yes, Sven Carlin Research Platform can email me with promotions and news". I won't spam you, but this is necessary to allow you to get emails from me, especially if you are from Europe and fall under the GDPR rules.

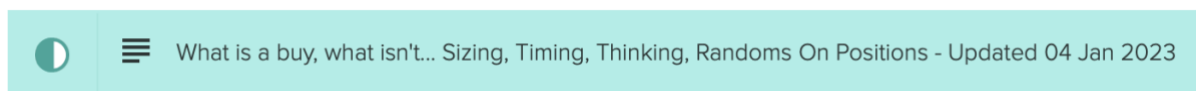
#### Notifications

<input type="checkbox"/>	Email me when someone responds to my comments.
<input type="checkbox"/>	Email me when someone comments on a discussion I've commented in.
<input checked="" type="checkbox"/>	Yes, Sven Carlin Research Platform can email me with promotions and news. (optional)

### Step 2 - Investing









Just go to the curriculum and in the second line, just below this one, you have the following:

#### SVEN CARLIN RESEARCH PLATFORM 2.0











This is updated on a monthly basis and I describe what to expect from every covered stock from a risk and reward perspective. Depends on what types of stocks to buy you are looking for, you can get the first explanation here; the quick take per covered stock.

Then, when you are interested in something, you can read about it in the research reports that are updated on earnings and significant developments.

	 Detailed Copper Investment Thesis And Value Investment Strategic Approach To The Sector
	 Alibaba Investment Thesis - Risk & Reward - Updated on Earnings 20 November 2022
	 Amsterdam Commodities AMS: ACOMO 23 November 2022
	 Berkshire Hathaway - What Matters - Updated 3 January 2023

If you are interested in what I do, you have my personal portfolio, the research platform model portfolio and the covered stocks 'demo' portfolio.

#### SVEN CARLIN RESEARCH PLATFORM 2.0

	 What is a buy, what isn't... Sizing, Timing, Thinking, Randoms On Positions - Updated 04 Jan 2023
	 SVEN CARLIN INVESTING - OPPORTUNISTIC
	 MODEL PORTFOLIO RESEARCH PLATFORM with MONTHLY ADDITIONS - Updated 05 January 2023
	 DEMO PORTFOLIO FOR IDEAS, STRATEGY, DIVERSIFICATION, FUN, EDUCATION, COVERAGE - Updated 5 January 2023

## RESEARCH PLATFORM PORTFOLIOS



**DIVERSIFIED/COVERED  
STOCK: IDEAS,  
DIVERSIFICATION  
(DEMO)**



**MODEL PORTFOLIO:  
GOOD BUSINESSES, FAIR  
PRICE, FULLY INVESTED**



**SVEN CARLIN:  
MODEL PORTFOLIO  
+ OPPORTUNISTIC**

You can read more about the specific strategies within each of the portfolio threads above but here is the short summary.

### The Sven Carlin Portfolio - Opportunistic Value Investing

This portfolio is one where I invest my money, focusing to build a long-term portfolio but also on taking advantage of the opportunities created by the market's irrationality and

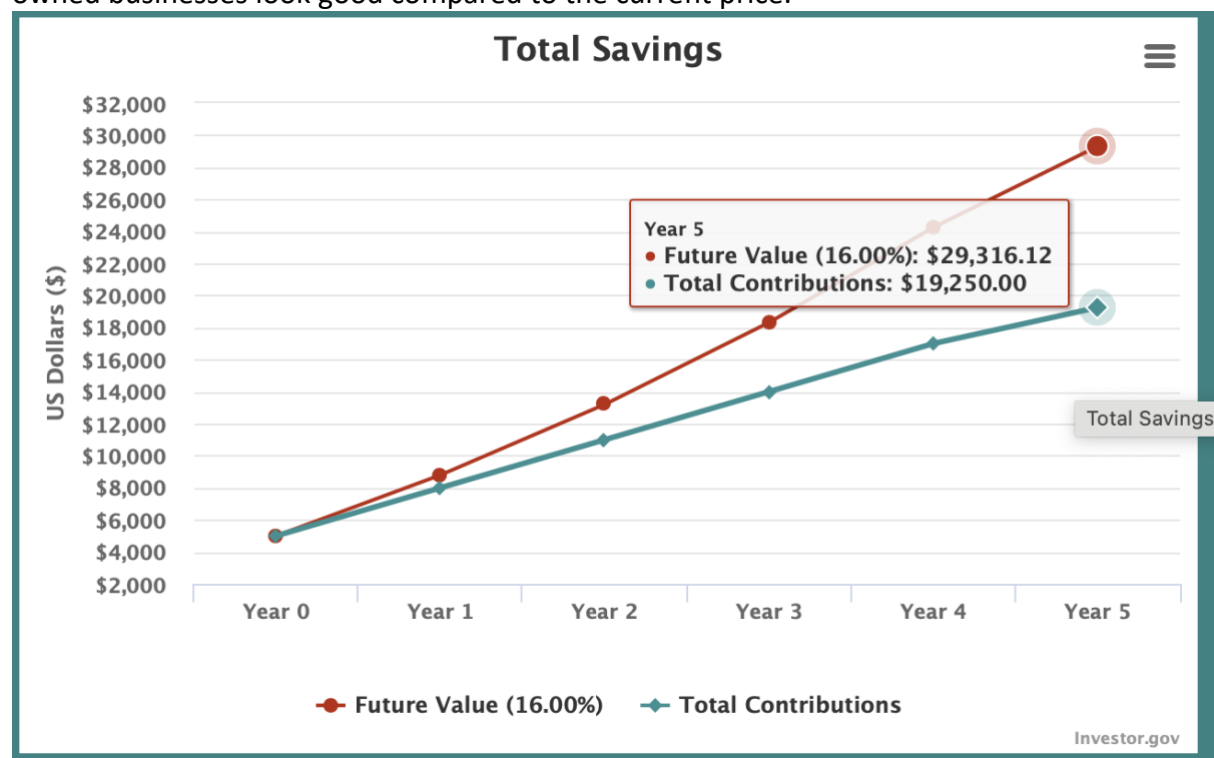
volatility. Thus, I am not always a 100% invested as I try to increase exposure when others panic. The strategy is to invest in good businesses when those offer a good return, but also to have a stash of cash to be ready when opportunity knocks.

Like in the model portfolio below, a invest part of my income on a monthly basis.

### The Model Portfolio - Global Value, DCA, Fully Invested

The Model Portfolio has been launched in 2018 at the start of this research platform with 5k and 250 monthly additions. The goal is to buy and own good businesses that offer double digit fundamental returns across the globe. The performance over the past 4 years and 8 months has been in line with the strategy where the current value (18 January 2023) is 29,500 on total investments of 19,250 for a yearly return of 16%.

I'll do my best to keep compounding in line with the strategy but of course, past performance is never a guarantee of future performance. However, the fundamentals of the owned businesses look good compared to the current price.







Model portfolio level on the 18th of January 2023

### Demo Diversified Portfolio

This portfolio has two main goals; The first one is for me to get a better sense of connection between the price of a stock and its fundamentals in a dynamic way on the stocks I cover on the Research Platform and include in this portfolio. The second goal is to offer ideas and especially strategies around those ideas to those who prefer being more diversified and having more investment ideas. The target number of positions in the portfolio is between 20 and 30 where the exposure is correlated to the risk and reward.

### Step 3 - Random

At the bottom of the first chapter there is the 'Issues investors have' thread where I discuss, analyze and provide possible solutions the various issues investors might have when it comes to investing.

	 Issues Investors Have - Possible Solutions
	 Emails Sent History - Updated 5 Jan 2023

The last thread has all the historical emails so if you missed one, you can always check above. Below the first chapter in the curriculum, there is everything I've done in the last 5 years. It is not that important for the future of the platform, but I leave it there for reference. Of course, when things on the market change, I can easily jump into the past research and update it.

if you have any questions:

**investwithsven@gmail.com**