

Frequently Asked Questions – Stock Market Research Platform

I'll try to summarize the most common questions I get about the [Research Platform](#) here, so, let's start. Here is the [video for those](#) that prefer watching.

1) Performance?

I am writing this in May of 2021. I started my LUMP SUM portfolio with 100,000 EUR in 2019. The value in the portfolio now is 193,800 EUR. With a fixed start and no additions, it will always be easy to measure performance.

I am looking at good businesses, in temporary unloved segments that offer a good absolute return from a business perspective, which gives a margin of safety and I get good dividends until the thesis develops. For example, in 2018/2019 I was very bullish on commodities and solar, while now I am slowly rotating into other sectors. Namely tech stocks while still enjoying the commodities value unlocking.

Such a strategy has worked well for me over the last 20 years, and I feel it will be good for the next 20 too.

2) Yearly subscription price?

My business model is the following: the yearly subscription price remains always the same for you. I see the price of my platform to be surely above \$1,000 per year in the near future and above \$2,000 in the mid-term. So, as long as the price is lower, you can lock in the yearly subscription with a discount forever.

3) Is it for someone without much time?

Simple answer there: YES. I usually send out one email a week where I summarize what I did. So, reading one or two emails a week is about it when it comes to the time you need.

A bit more of time is required before you make an investing decision, but if you put your money into something, I am sure you want to know some about it. In general, just to follow on the few positions of interest to you, not much time is needed as I try to summarize the investing risks and rewards as best as I can. (but a 20 page report read here and there will be required)

On the other hand, if you are interested in businesses, analysis and research, you can read for hours!

4) Can I just copy your portfolio?

Unfortunately, yes. I say unfortunately because my research platform is just that, a research platform. However, I also show what I do with my money to have skin in the game. After each transaction I make, I send out an email and if you must, you can simply copy.

My hope is always that you know what you are investing in first, so I wish you read the research report of the stock I am investing in, understand the risk and reward and then see how it fits you.

5) Transaction frequency?

That depends on the portfolio. The Model portfolio has monthly additions and thus monthly purchases where I add to the portfolio what I think the best buy for the month is.

The Lum Sum portfolio has less transactions but the dividends are being reinvested so that is also something but given the core portfolio positions, the number of transactions should be lower.

The Large portfolio where I manage 20 positions should have the most transactions as there is more to do with more businesses but it all depends on what is going on in the market and what are the opportunities.

Anyway, you will see how what fits you. But I am certainly not a trader that is in and out of something in a day, week or month.

6) Do I accept research tips?

I have added a section on the platform where you can share your ideas, others then discuss it and you never know, if something is really interesting, I might pick it up, but I can't make promises.

7) How to start?

The key is to understand it all is a process. Years of research have gone into the platform, so you will need to take some time to understand the investment theses, risk and rewards. Best is to simply absorb the info through the earnings updates that I make.

Don't forget to allow for all emails to be received in the setting (3 boxes to tick) and check the [comparative stock excel list](#) that has it all: comparative valuation, intrinsic value table and link to research alongside portfolio overview. A good think to do is to also check my last [overview of the last emails I sent out](#).