

InvestiQuant

Trader Spotlight: Dale

Client Since 2017 – Discretionary/Systematic Trader, Part-time

Background

I grew up in Australia in a large family of 6, I have a Bachelor of Business in IT degree at a university in a beautiful part of Australia called the sunshine coast. I'm now a computer programmer by trade, but I also love to surf. I moved to Mexico where waves and warm water are plentiful, and I have been here in a little coastal town known for its excellent waves (Mexican pipeline) for 16 years.



Trading Goals

I became fascinated with investing first when I was about 8 years old. It fascinated me that all these people in life work really hard and sometimes don't make much money, and here is a guy, Warren Buffet, that just patiently invested from a young age and became incredibly wealthy. So, every time I went to the library as a kid I would read as much as I could about Warren / and or investing. When I reached my late teens and finally had some money to invest, I would invest in companies I thought Warren would like (basically from fundamental analysis). That did well for many years, however it required a lot of time and patience and unless you have millions, you can't live from the income of it as the paydays are random and far dispersed.

This brings me to my goal of actually being able to live from my trading/investing income so I can continue living in places with warm water and delicious tacos, and still have plenty of time for other things such as surfing. I recall reading about Soros' Quantum hedge fund, which at that time, had averaged 40% returns for decades, and possibly that was the switch to turn to trading.

History with InvestiQuant

I have been a very happy client of InvestiQuant for 4 years now. I prefer quantified edges over discretionary trading, something that you can systemize and repeat consistently. I really found the concept behind the edges super cool - lets you get a variety of systems, run them on the most recent market conditions and see what is more likely to happen statistically. I also really appreciate the "family" feel of InvestiQuant. It's open, super friendly and very honest - who doesn't want that in a financial partnership!



To learn more, email: Brian@InvestiQuant.com

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Trading Style

I've never traded full time. In fact, full time trading doesn't appeal to me. I would much rather be surfing or traveling than watching a screen, hence my strong focus on systematic and if possible automated trading. I trade a combination of 2 methods of systematic trading, automated and manual.

How I Use InvestiQuant

Systematic Algorithmic Trading:

I trade mean reversion and momentum systems on stocks using holding periods of 1-3 days. I also execute swing trading systems in metals and currencies using breakouts, mean reversion, and seasonality. (I'm currently working on automating some awesome systems that I have found in the InvestiQuant Discover platform for my next automated strategies.

For Systematic Manual Trading:

I use InvestiQuant's data from the iQ Edges section of Discover.

I actually only started this when InvestiQuant launched Discover last year and I had time on my hands to do some intraday trading. But even then, I was systematic with my approach so I could repeat it.



Advice for Traders

If you like systematic or even discretionary trading based on quantified edges, or even if you simply want more trading system ideas, you are at the perfect place. Discover is awesome. You can regularly find new trading edges or systems, or if you don't have time to discover edges yourself, let their algos find the best systems via their SSE Library!

Then simply click to be alerted for the strategies you want to trade, and when you login each morning it will let you know if the strategy will trigger! It's really that good.

If you do end up using Discover, my hot tip is to make sure you tell Discover to factor in your trading costs. It's a long-ingrained habit that comes from wanting to still have a "worst case" scenario Profit Factor of 1.3 after spread, slippage and other costs.

In any case, don't give up easily...if you start small, the losing months should be very bearable, and you won't quit at the wrong time. Think years instead of months, combine multiple strategies to smooth out your returns, let your returns compound, and enjoy discovering!