

Turning Point Analytics

Independent Research Provider Profile

Turning Point Analytics (TPA) is the culmination of more than 25 years of trading experience combined with the development of risk and trading strategies for portfolio managers. TPA strives to be a complement to busy managers, traders and analysts by maximizing the potential of existing positions, identifying new opportunities and, controlling risk. TPA advises on portfolio or universe specific stocks, creates a coherent argument out of the market's mosaic, and uses technical analysis to point out the larger picture.

RESEARCH TYPE

Technical Research with an overlay of Fundamental or Macro Analysis

APPROACH

Proprietary Independent Research

COVERAGE

Global

METHODOLOGY

TPA uses the Trend-Range Strategy, a technical analysis method developed over the last 11 years, to optimize entry and exit points and add alpha. TPA identifies opportunities, applies a simple risk-return metric and plans a logical course of action. Each recommendation includes a Target and Stop.

- **Trend-Range Strategy** - An overlay strategy designed to add alpha to the investment process.
- **Trend-Range Risk Management** - Reducing risk through the Trend Range Method.

Each Trend-Range module will:

- Provide a detailed technical analysis of a portfolio/focus list
- Identify trending securities that break pattern
- Identify range bound securities trading at extremes
- Analyze each security in the larger context of its relevant sector and market

PRODUCTS

- Trend-Range Snapshot – A detailed technical analysis of your entire portfolio in the context of its relative sector and market.
- Snapshot Comments & Charts – TPA's focus items from your portfolio with recommendations.
- Direct & timely phone calls for each recommendation, and 24/7 availability for stock, sector, and market coverage.

Each recommendation will include:

- A supporting technical discussion
- Charts or multiple charts with critical annotations
- A target price and a stop price

PRINCIPAL

Jeff Marcus has spent more than 21 years as a buy-side trader.

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For more information please contact your Tradebook Sales Representative or email

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About Bloomberg Tradebook

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