

# InvestiQuant

## Trader Spotlight: Wayne

*Client Since 2011 — Discretionary Trader, Part-time*

### Background

I retired from Shell Oil 10 years ago after 38 years split between Financial and IT strategic sourcing. I graduated from The University of Texas and am a CPA, but don't currently practice. I have a good mathematical background and understand money management.

I have twin sons who live in Durham, one a psychiatrist and one a lawyer. I am an avid sports fan, especially UT football where we have been season ticket holders for 35 years. When at home in The Woodlands, I am an active tennis player and walk 3-5 miles a day with my Golden Retriever, Lady Kenzie.

I am an avid traveler, especially to the Caribbean and have a bucket list to go to every St. Island, St Bart, St John, St Thomas, etc. Only 2 left.



The nice thing is, I can take my trading with me. When my wife is working out, I'm paying for the

### Trading Goals



I have different goals than most traders in that I look for a dollar target not a percentage return.

My goal is not to blow out my account and live to see another day. If I can fund my travel needs, I'm happy.

### History with InvestiQuant

I met Scott through TradeStation when he was known as “the gap guy” and our relationship has grown from there. Just trading the gap could be frustrating because oftentimes the odds were not favorable. Also, the gap guides were limited to bigger stops than I wanted to use. But it gave me the support platform to learn to trade. And It has grown with me.

I view it as a loaf of bread. I may not eat every slice, but there are many that fit my needs. I can use as much as I need for my plan. And it continues to evolve with me as my trading matures.

To learn more, email: [Brian@InvestiQuant.com](mailto:Brian@InvestiQuant.com)

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### Trading Style

**Don't be a one trick pony or put all of your eggs in one basket!**

I only trade futures, ES/NQ/RTY. I tried gold and oil for a while but was not successful. I never intentionally keep a position overnight and while I trade almost every day, I'm not a full-time trader. I normally trade the first hour then go play tennis or sit on the beach. I'm trying to get away from setting targets and let winners run, but I always set tight stops. Tight stops give me peace of mind, but they really work better when I can be by the computer most of the day.



I allocate some of my portfolio to trading so I can make money no matter which direction the market is going. Shorting individual stocks is more difficult.

### How I Use InvestiQuant

**The most critical part of my trading strategy is IQ auto trading.** If I'm traveling or just not able to be at my computer, IQ auto trading takes care of me.

Bigger money can be made by catching trends rather than setting targets and that's what the auto trading does. I still like to manage some of my trades because it keeps my mind working and that's where the guides come in. When I no longer want to do the work myself, I'll still have IQ auto trading to work for me.

Because I was raised on the MASTER THE GAP guides, I primarily use the Edges section of the Discover platform. Every day I mark my charts for the 3 instruments with HCOL and the upper and lower gaps. Then I look for what opening will give me a 62% win and a 1.2% PF. I usually trade all that fit those metrics, and use PC (prior close) as a target. I then look at the SSE database app and expand my search to include other criteria that may help me follow the gap instead of fade. I use the 15- and 30-minute opening range EDGES to enter a new trade or add to an existing trade.

Finally, I use DISCOVER to look for opportunities to be long at the end of the day. I rarely enter the last hour but I may keep a position open and let it run longer. I do look at alerts, but more for confirmation of the above.

Matt is a tremendous help with his twice a day Daily iQ video. I'm not smart enough yet to understand what factors really impact a trade or are just part of the environment. Matt is helping me there. i.e. I know a wet track influences a horse race but I have no idea if the color of the horse does, even though a brown horse wins 80% of the time.

### Advice for Traders

Overall IQ provides much more than most traders will ever use, but there is something for everyone and allows you to grow with it.

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