CARD BUILDER

@fmaunlv

The Investment Rationale Card

Answer five questions and watch your card build itself below. Fill it in calm, obey it in panic.

Why do I own this?
What do you understand that makes it worth holding for years?
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What am I expecting to happen?
Be specific: revenue growth, a dividend, expansion.
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How long will I hold it?
A real horizon: 5, 10, 20 years.
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When would I sell?
What would have to change in the plan, not in your mood.
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My rule when markets drop
Example: I do not sell for 90 days after any 20% fall.
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Fear is loud. A written rule is louder.
Losses sting twice as hard as gains feel good. Plan for it.

Decide your exit before you enter.

Comment "RATIONALE"

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