# Investments

## Resources for your Investment Decisions

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# What is a Registered Investment Advisor—RIA

- **Registered Investment Advisor (RIA) is:**
- an advisor or firm engaged in the investment advisory business
- registered either with the Securities and Exchange Commission (SEC) or state securities authorities.
- 
- RIA's have a fiduciary duty to their clients, which means:
- they have a fundamental obligation to provide suitable investment advice and always act in their clients best interests.

Source: Investopedia

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# Fin viz Finviz.com

- A free tool providing market maps, advanced stock screeners and analytical tools in a highly visual, easy to use format. Site also contains a premium service for a fee.

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# StockCharts Stockcharts.com

- Extensive educational resource for investors of all levels.
- Provides opportunity to learn everything there is to know about investing and analysis of financial charts.
- Presents articles that may help you understand more about Technical Analysis, Fundamental Analysis, and investing in the financial markets.
- Free and fee based subscription service.

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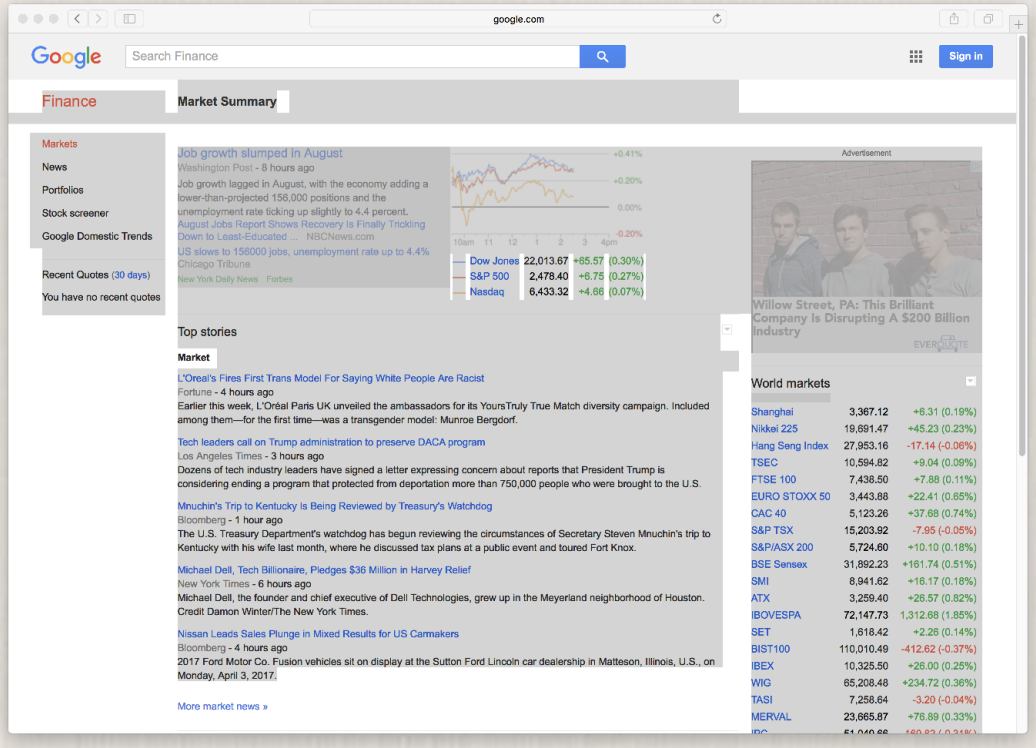
# Finance.Google.com

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# Seeking Alpha seekingalpha.com

- A content service for financial markets.
- Articles and research cover broad range of stocks, asset classes, ETF's and investment strategies.
- Insight provided by contributor base of investors and industry experts.
- Free and pay options

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# Morningstar.com

morningstar.com

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**Friday, September 1, 2017**

Rekenthaler Report

**What Is the Right Amount of International Diversification?**

Whatever amount you wish (within reason).

- 3 Gold-Rated Foreign-Stock Funds
- 2 Favorite ETFs for Foreign Diversification

ETF Investing

**The Case for Owning the U.S. Market Portfolio**

This total market index fund should be the default option for most investors' core U.S. equity allocations.

- Should You Own the Market Portfolio?
- 3 ETFs for a Diversified, Low-Cost Portfolio
- Most Investors Probably Won't Outperform This Simple Portfolio

Video Report

**Grainger Can Grow Dividend Despite Amazon Threat**

Though the narrow-moat distributor may not have the pricing power it once had, we think it can maintain high single-digit dividend growth.

- General Mills: 120 Years of Commitment to Its Dividend
- Dominion Energy Is a Great Dividend Opportunity

Market Update

**5 Stocks Top International Managers Have Been Buying**

These medalist managers from Artisan, Dodge & Cox, and Vontobel picked up Internet giants, depressed energy stocks, and a European telecom last quarter.

- No Summer Break for Taxable Bond, International Equity Funds
- 7 Stocks Top Large-Cap Managers Have Been Buying

**Market Barometer**

Lg
Md
Sm

1Wk 1Mo 3Mo 1Yr 3Yr

Data currently unavailable.

**Premium:** Our top-rated funds

**Market News**

**Stocks Edge Higher, Dollar Weakens After Jobs Report**

**U.S. Adds 156,000 Jobs in August as Unemployment Rate Edges Higher**

ISM Manufacturing Index Jumps to 6-Year High in August

Construction Spending Dips but Year to Date Remains 5% Higher Than 2016

Consumer Sentiment Retreats in Late August

Gas Prices Jump Amid Storm-Related Refinery Closures

European Stocks End Higher on Dovish ECB Expectations, U.S. Jobs Data

**Market Indexes**

iPhone

U.S. | Morningstar | Asian | European

22,050
21,983
21,915

9:30AM 11:30 1:30 3:30 Value

| Index | Value | Change | Change % |
|---|---|---|---|
| DJIA | 22,014.54 | 66.44 | 0.30 |
| S&P 500 | 2,478.47 | 6.82 | 0.28 |
| NASDAQ | 6,433.12 | 4.46 | 0.07 |
| Morningstar US Market | 6,218.62 | 18.48 | 0.30 |
| Morningstar Small Cap | 8,947.60 | 41.24 | 0.46 |

Data as of 09-01-2017

Get Started →

Morningstar Premium

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# Investors.com

- Financial research and media company covering international business, finance, economics and the stock market.
- Information about stocks, mutual funds, ETF's, commodities and other financial instruments aimed at individual investors and financial professionals.
- Free and subscription services

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# Stock Master

# App only

- Provides stock quotes, push and email notifications, stock portfolios and watch lists.
- Limited to iPhone and iPad
- Free and subscription services

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# Bollinger Bands BollingerBands.com

- A tool invented by John Bollinger in the 1980's
- Bollinger Bands are a volatility indicator
- John Bollinger writes a monthly Newsletter with weekly updates.
- A subscription service

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# Yahoo Finance Finance.yahoo.com

- Provides financial news, data and commentary including stock quotes, press releases, and financial reports.
- Offers some tools for personal financial management.
- Provides historic price of stocks, mutual funds and ETF's.
- Free

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# Spike Trade Spiketrade.com

- Provides trading ideas from Founder and Co-Director and members.
- Traders Education provides a number of resources for serious traders.
- A subscription service

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# Stock Market Update
# www.weisonwyckoff.com

- By David H. Weis
- Daily Update
- Free

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# Motley Fool. Fool.com

- Subscription Service - Various Newsletters:
  - Stock Advisor
  - Rule Breakers
  - Hidden Gems
  - Income Investor
  - Inside Value

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# Sound Mind Investing
# Soundmindinvesting.com

Faith-based Subscription Service

Started by Larry Burkett

Continued by Austin Pryor

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# Cnbc.com

- Business TV channel
- Much of it is free

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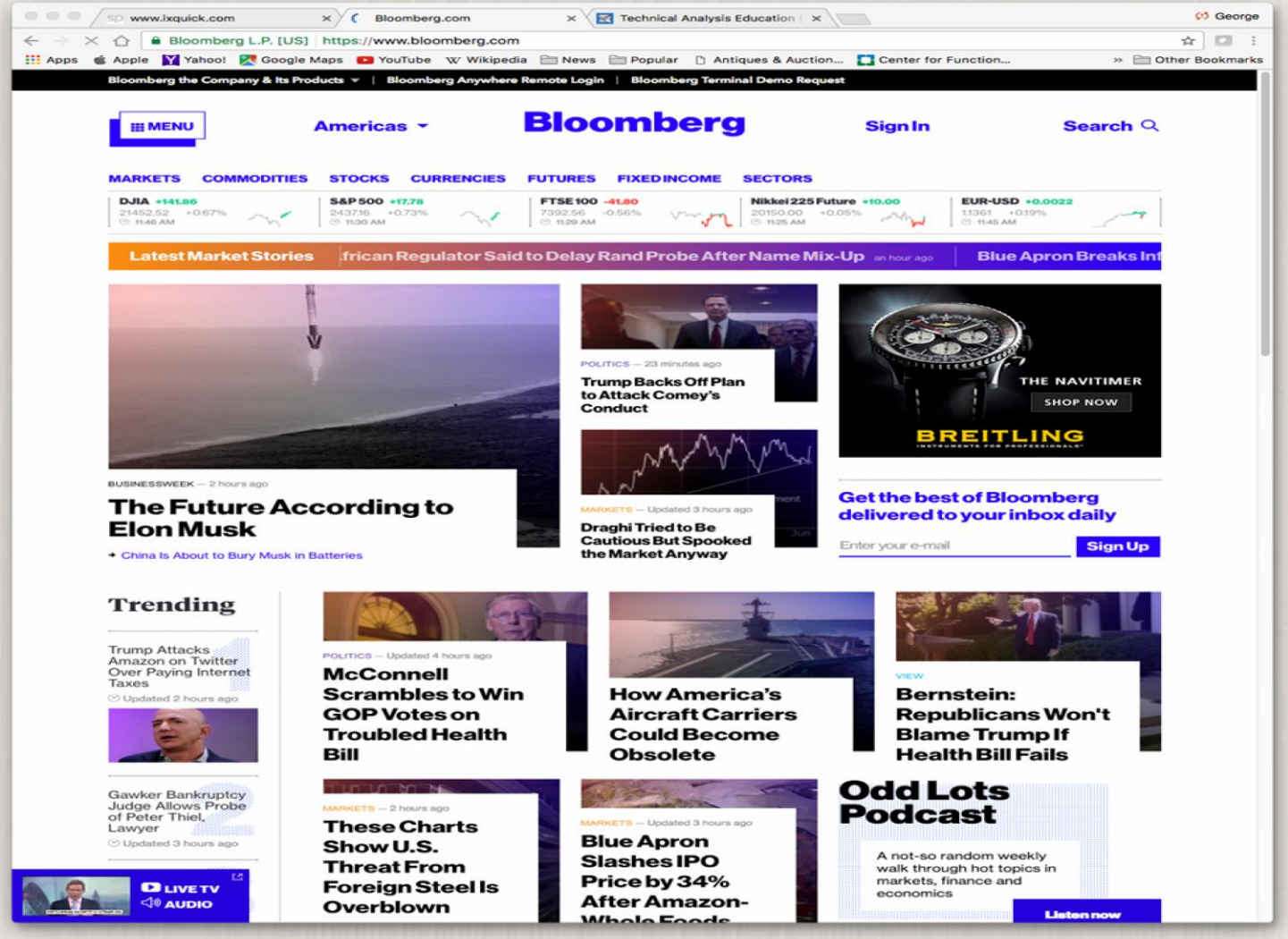
# Bloomberg.com

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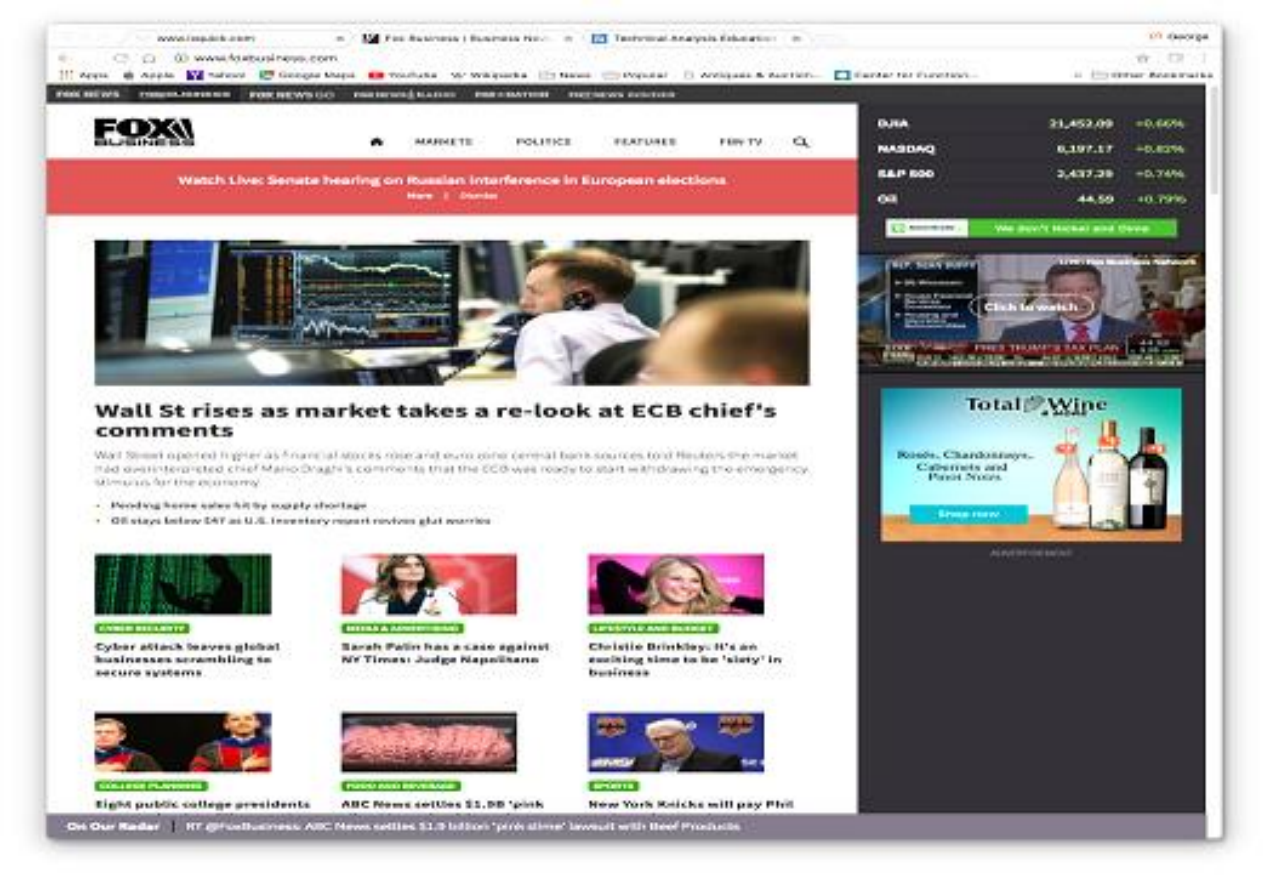
# foxbusiness.com

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# Wall Street Journal WSJ.com

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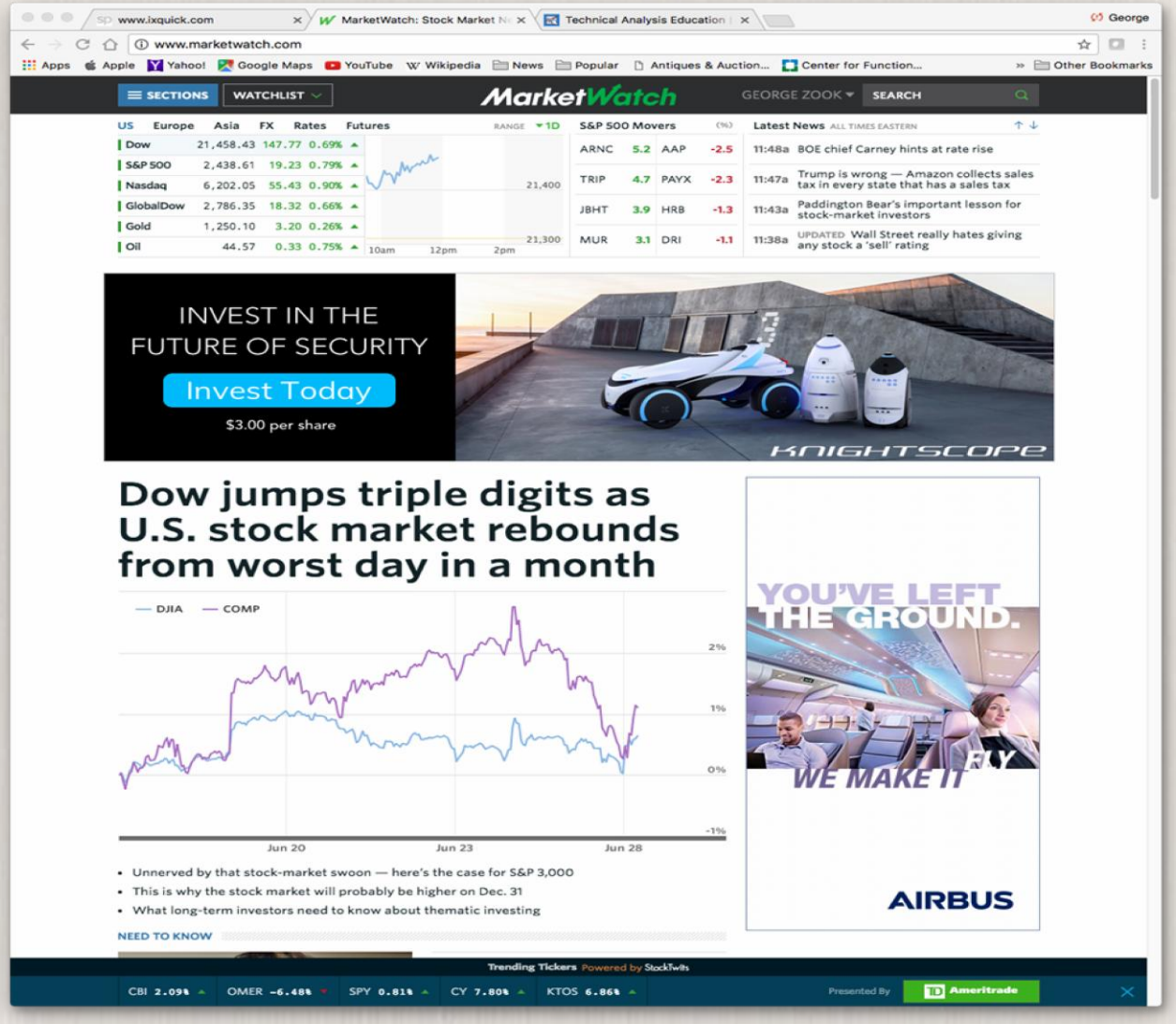
# Marketwatch.com

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# My wish for you:

# Hey diddle diddle,
# the cat and the fiddle,
# the DOW jumped over the moon.

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