

Jake Bernstein

Trading Webinar

<http://www.jakebernstein.com>

Urgent Market Update II

Predicted Explosive Moves in Process

What the Indicators are Telling me Now and
Why INFLATION IS IMMINENT and what to do

Wednesday 25 July 2012

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800-678-5253 * 831-430-0600

My goals today

- Based on my research and indicators I see huge moves, some already started (grains and soybeans) but many still in their infancy
- Government has virtually insured us of inflation and we need to take action
- I want to share with you WHAT and approximately WHEN I see these moves coming
- I can't do this in an e-mail – there is so much to say and e-mail is not interactive
- I may be wrong BUT the evidence is clear and undeniable to me
- MOST PEOPLE are confused because they do not understand economics or history AND we have been lied to repeatedly and cheated repeatedly – loss of confidence and lack of direction
- LIBOR (London Interbank Bogus Offering Rate) my view

What I Told you Last Month: Status

- Many markets are approaching or are now in cyclical and or seasonal time frames for trend changes: **have started**
- Economic cycles are reaching a critical juncture: **getting closer**
- Geopolitical issues are coming to a turning point: **getting closer**
- Numerous divergence signals and setups are appearing: **some triggers**
- Central bank actions continue to forecast inflationary outcomes
- Commitments of Traders Report commercial activity reaches record long levels in several cases and in many others continues to forecast strong bull markets: **you see what's happening – this is just the beginning**
- Small trader sentiment and professional sentiment remain generally negative which provides a bullish backdrop for price movements: **still so**
- Intermediate term cyclical behavior and forecasts strongly suggest confluence and accelerated change over the next six months: **still so**
- Market volatility sets background for additional extreme and potentially explosive price moves: **brace yourself – you ain't seen anything yet**
- Generational opportunities continue in several markets: **have started LL**

My goals for today

- To update you on the status of timing, cycles and seasonals in all active markets including major stock indices and several stocks
- To project price moves over the next six to 9 months
- To explain and clarify why my inflationary expectations continue to dominate my forecasts – where are now?
- To zero in on timing setups and triggers that will help you take advantage of the moves that I see developing and to UPDATE you
- If you are a hedger or producer my goal is to provide you with a logical and intelligent forecast of what you can do right now and what to expect in the next few months
- If you are an investor my goal is to provide you with some general as well as specific guidelines regarding the best investments I see developing at this time and
- If you are concerned about what is now developing in economies all over the world, to assuage your fears or concerns with intelligent and logical input as opposed to irrational or politically motivated conclusions so that you can be prepared

Agenda

- **Current short-term and intermediate-term status of all market futures and financials including the stock market**
- **Are grains and beans about to top seasonally, or SOAR out of sight?**
- **Is the BEST yet to come in all metals?**
- **CURRENCIES - dead cat bounce or major low?**
- **Critical juncture in economies and the cost of money**
- **Natural gas - exploding at last?**
- **Strategies for the next few weeks and months**
- **4 SPREADS to watch right now**
- **Lumber - sleeping giant**
- **"Smells like inflation" wake up!**
- **My game plan**
- **5 stocks for NOW**
- **And more!**

- I have valid technical and historical reason(s) to conclude that we have started an inflationary cycle in virtually all markets that will continue for several years...I further believe based on the evidence available to me that energies and or metals are on the threshold of explosive moves...how many warnings do we need to have before we take action?

Structure: how we will do it

- We will examine AND UPDATE YOU ON all active markets on the basis of four specific factors:
 - 1. intermediate and or long-term and/or short-term cycles
 - 2. Seasonal patterns
 - 3. Support and resistance levels
 - 4. Trend and or projected trend
 - 5. COT status and significance where applicable
 - 6. To talk about my time line
 - 7. Current or developing timing triggers
 - 8. Expectations and recommendations
 - 9. Other factors that may be unique or specific to particular markets

The Major Forces into 2012-13

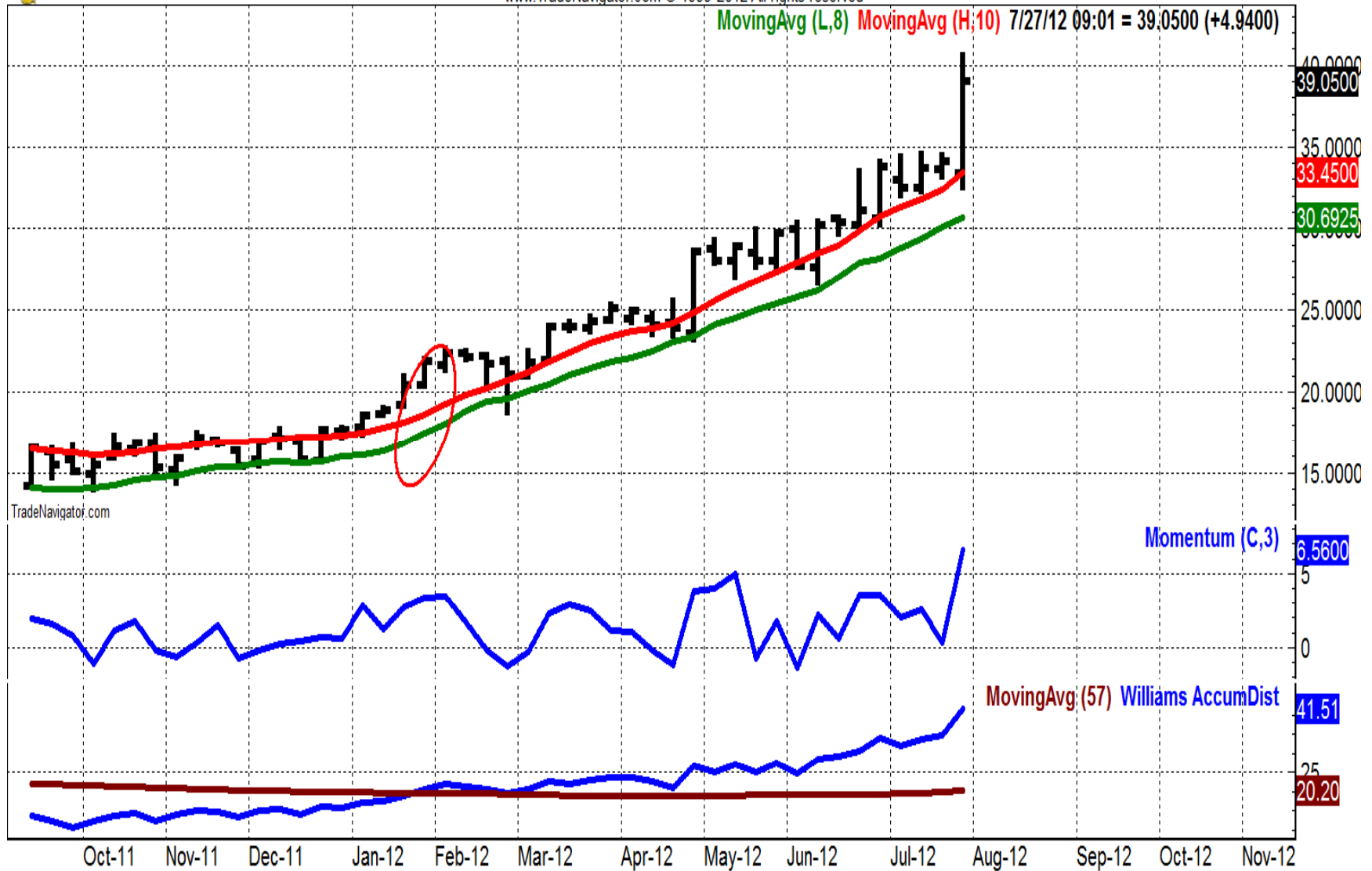
- Long term cycles and status
- Currency debasement takes a new turn – fiat money
- Currency relationships more volatile than ever
- Interest rate cycles and relationships: TBT (chart)
- Timing triggers
- Geo-political instability as an exacerbating factor (Iran, Syria, Middle East)
- Intermediate term cycles
- COT status of Commercials – MAJOR factor
- Confluence: COT+CYCLES+FIAT MONEY

When I recommended LL



LL: Lumber Liquidators Holdings, I (Weekly bars)

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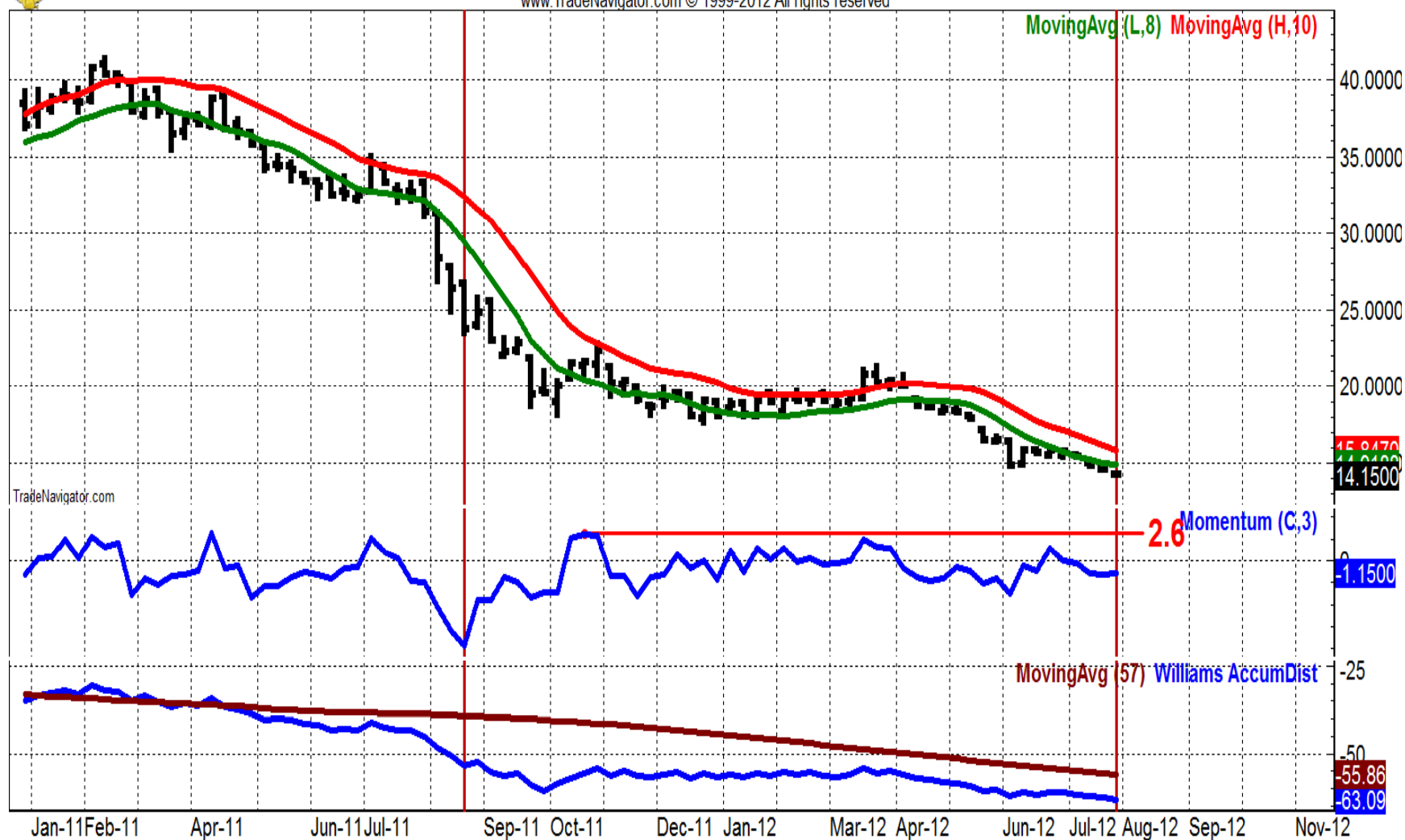


Now I give you one way to play the IMMINENT % rate rise: TBT Weekly!

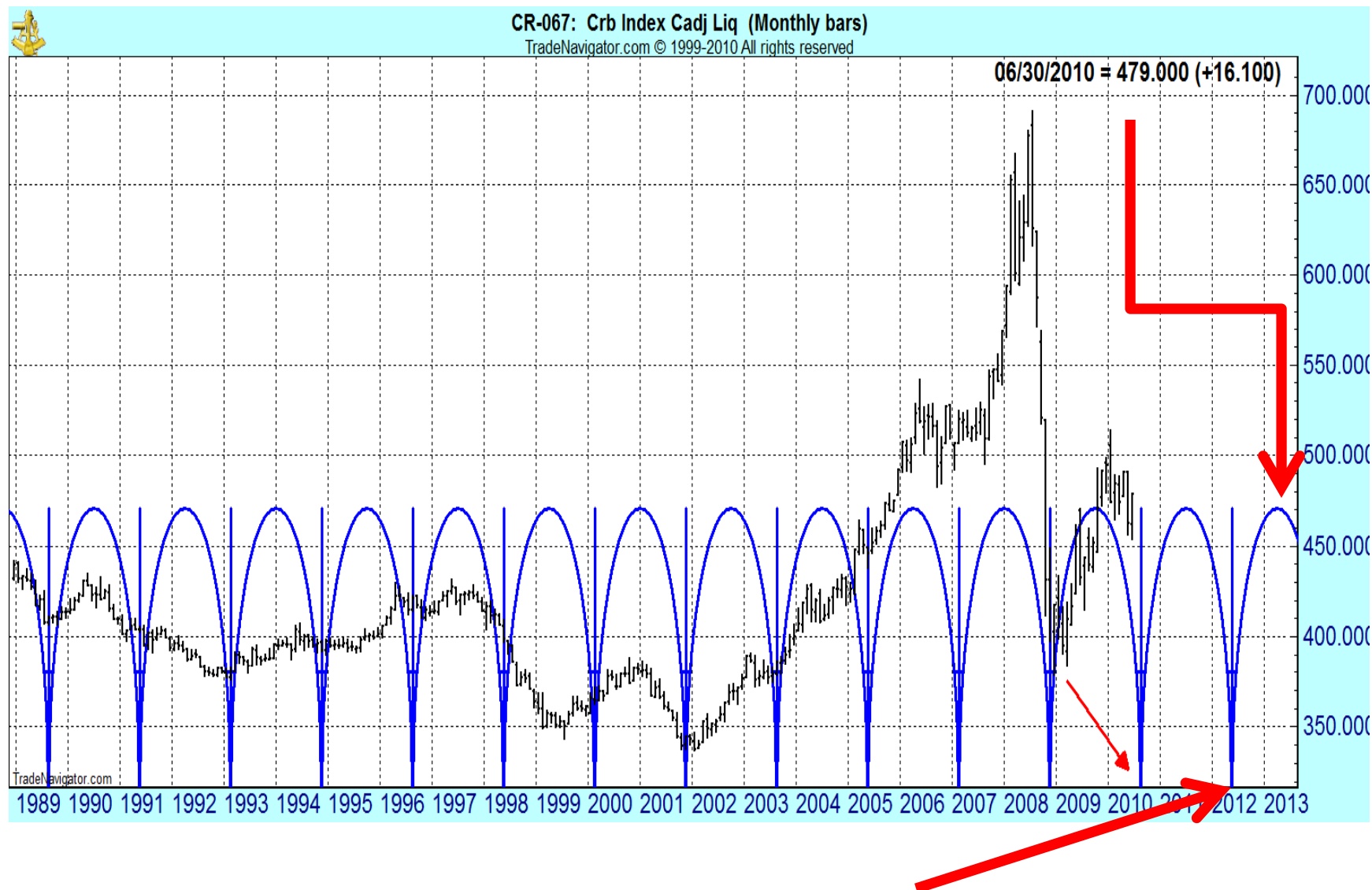


TBT: ProShares UltraShort 20+ Year (Weekly bars)

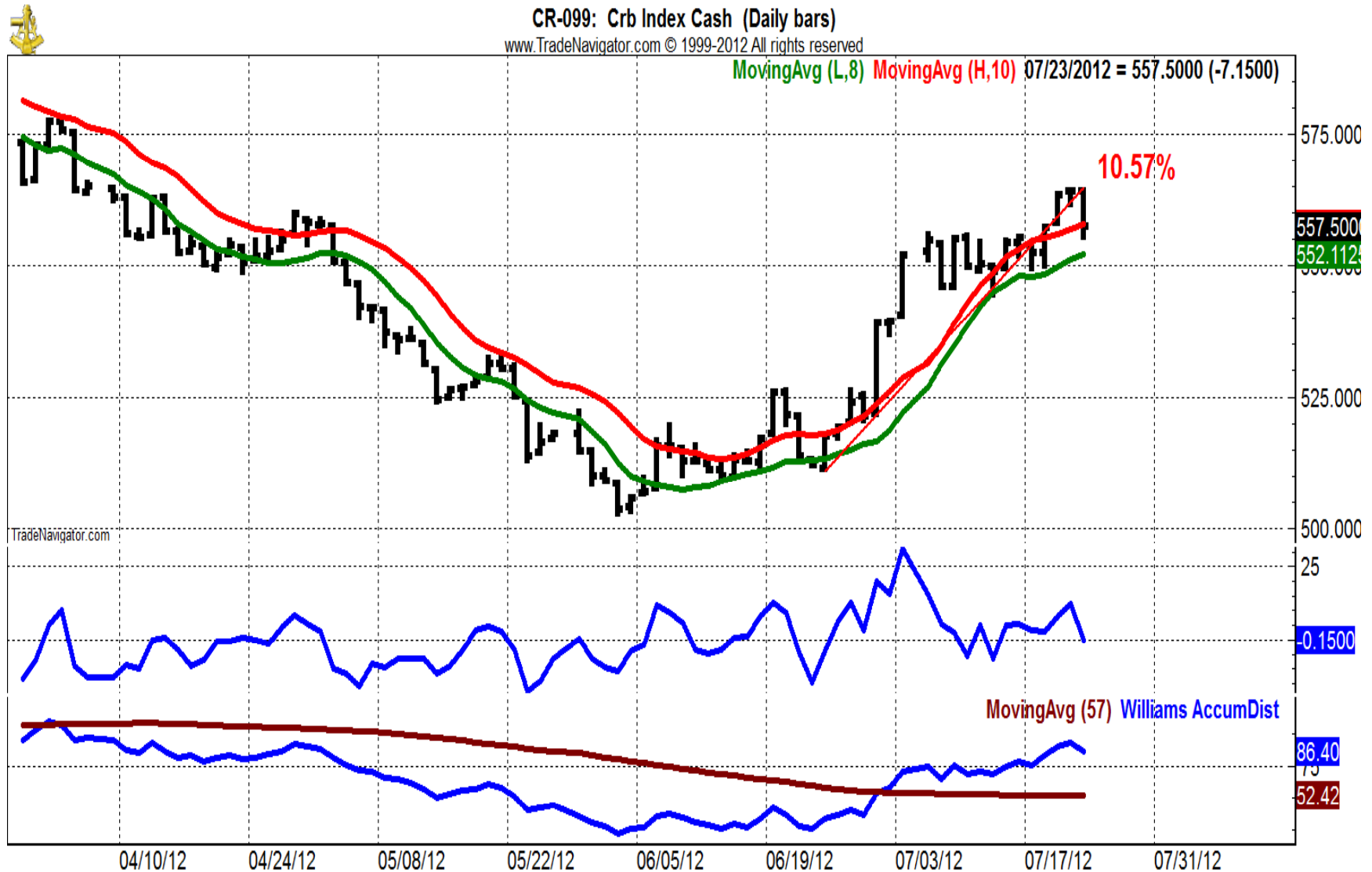
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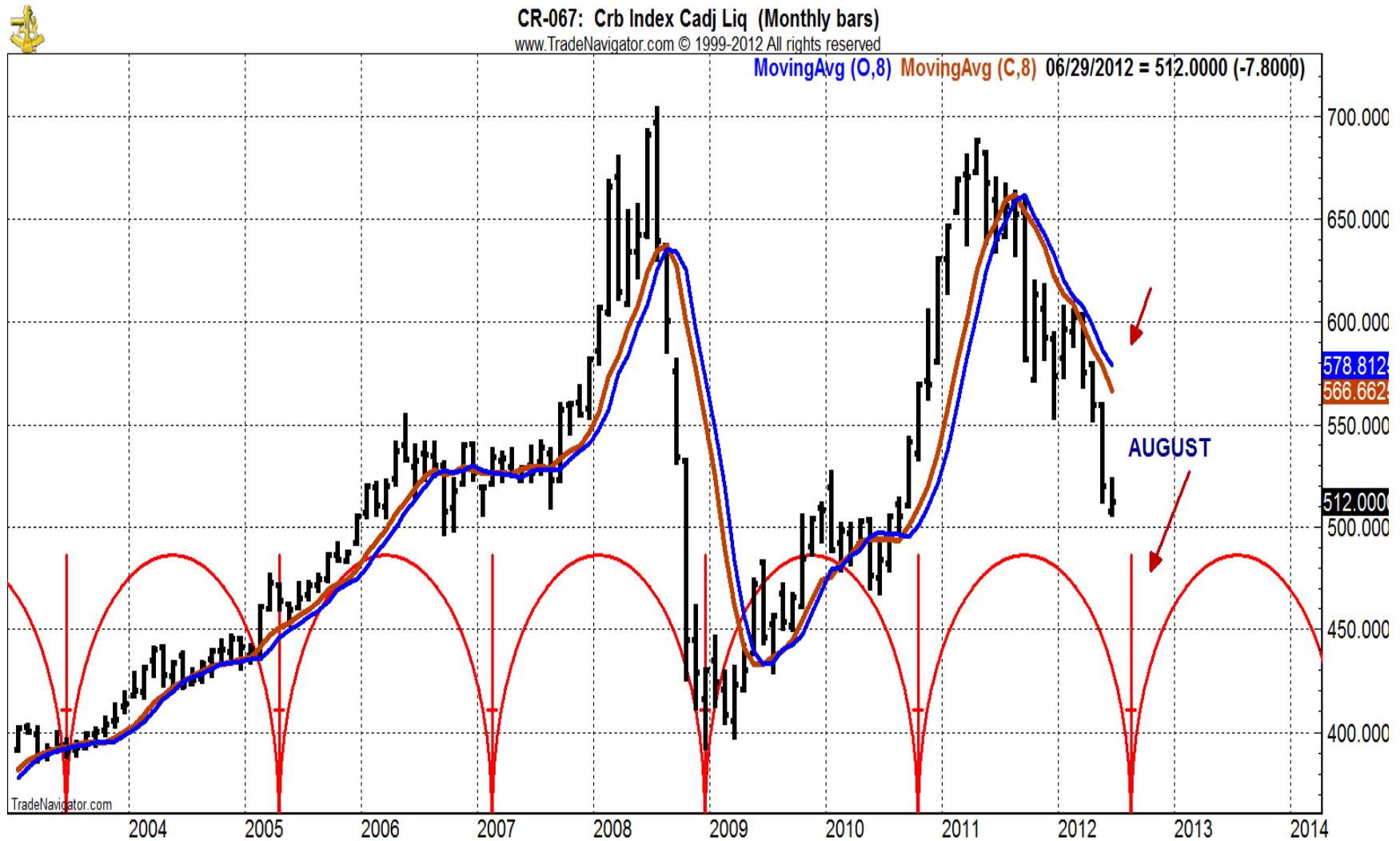
Approx 2.6-3.2 yr cycle CRB Index: Apr 2013 ideal top



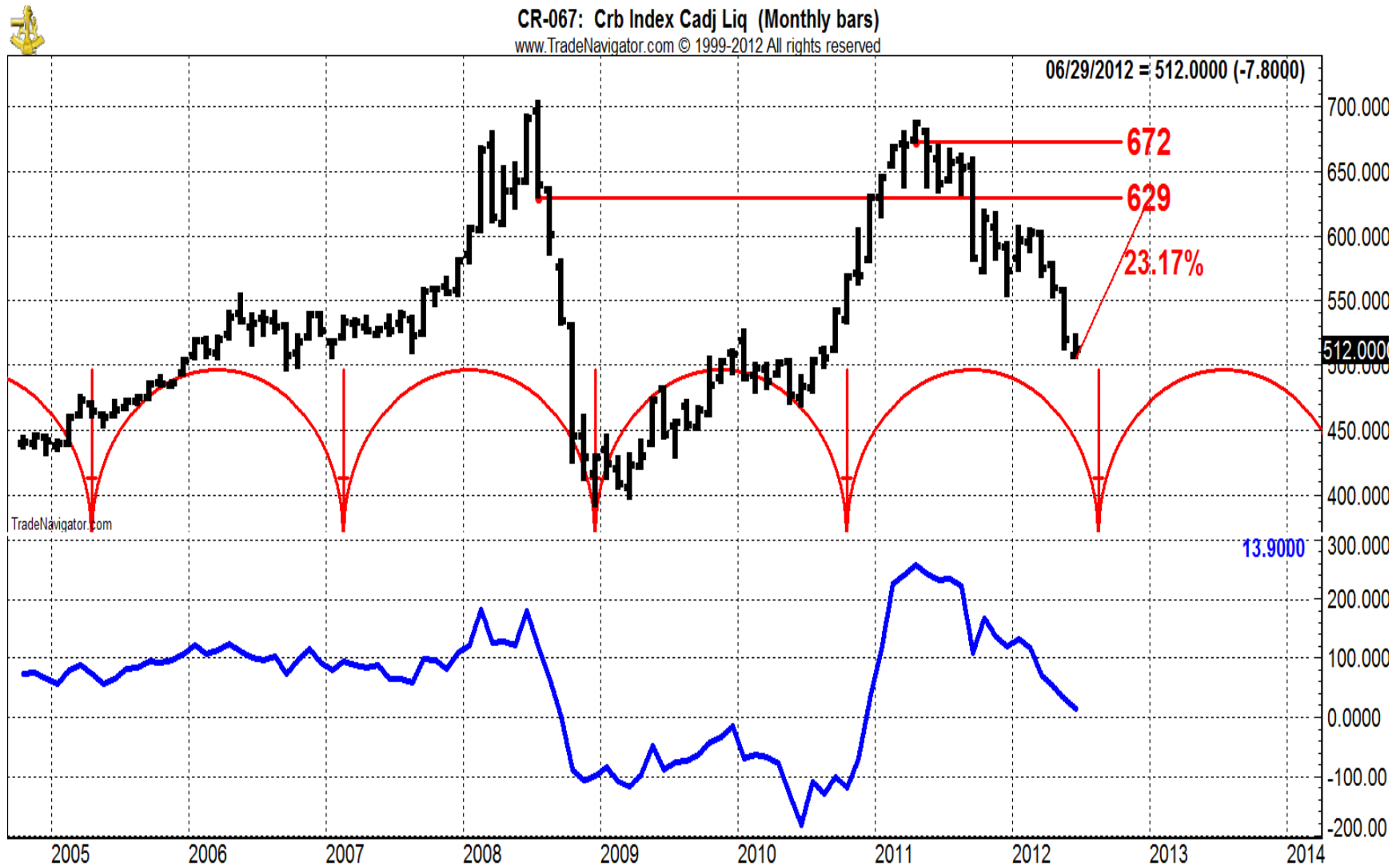
Since last Webinar



CRB What happened and projection



23%+ gain likely



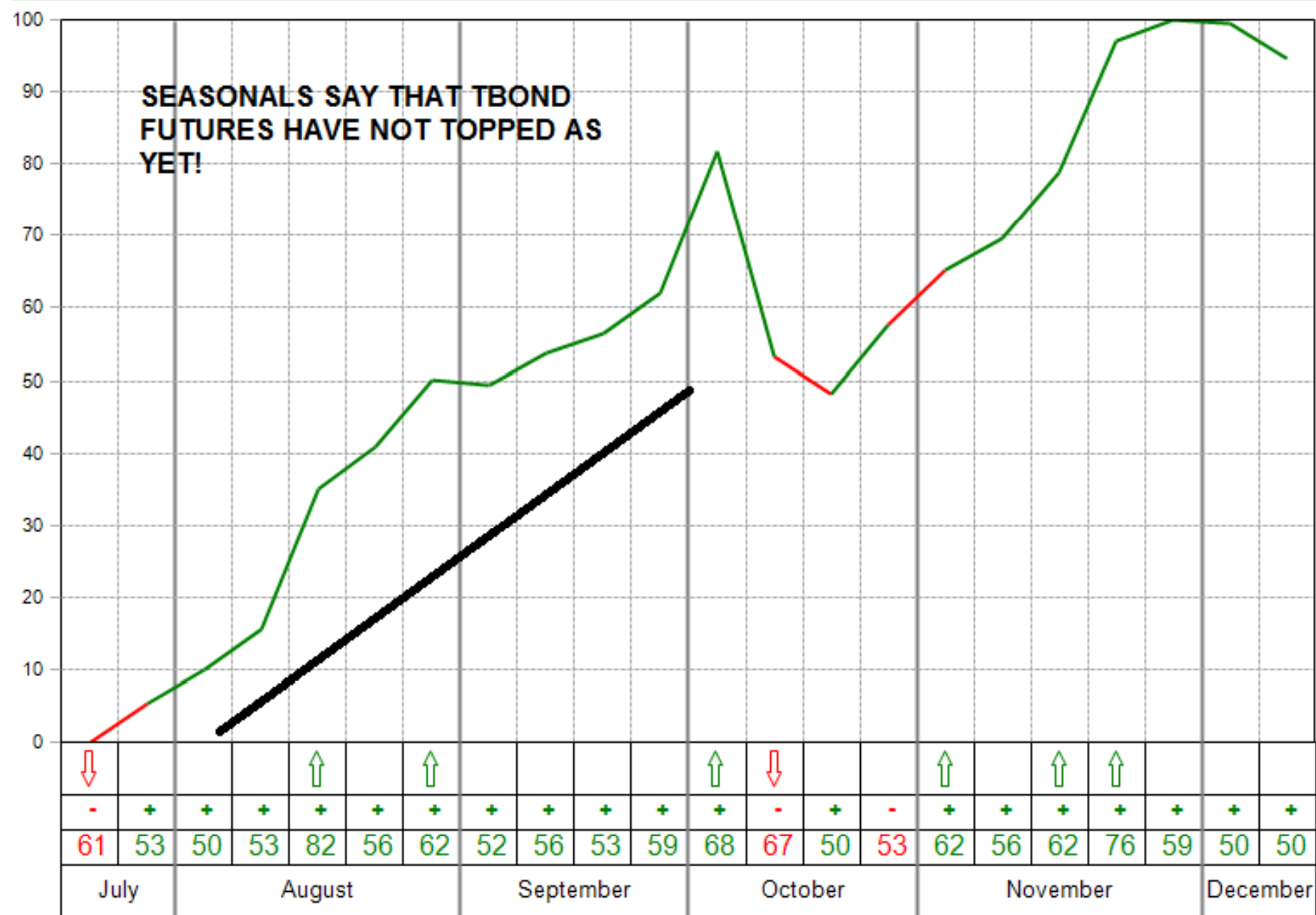
What does a 23% gain mean?

- Crude oil at 81 = \$16 +
- Gold at 1600 = 1980
- Soybeans at 14.41 = 17.39
- Corn at 7.50 = 9.23
- S&P at 1325 = 1629
- Sugar at 20.90 = 24.96
- Be prepared!

Can interest rate futures move higher?

- The odds favor stable or lower interest rates for the next six months due to political factors: correct (seasonal chart)*
- Thereafter interest rates are likely to go higher and considerably so (TBT)
- All efforts to keep interest rates low due to forthcoming elections will add to the ultimately inflationary scenario (leaked report yesterday)

WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - T-Bonds 1978 - 2012

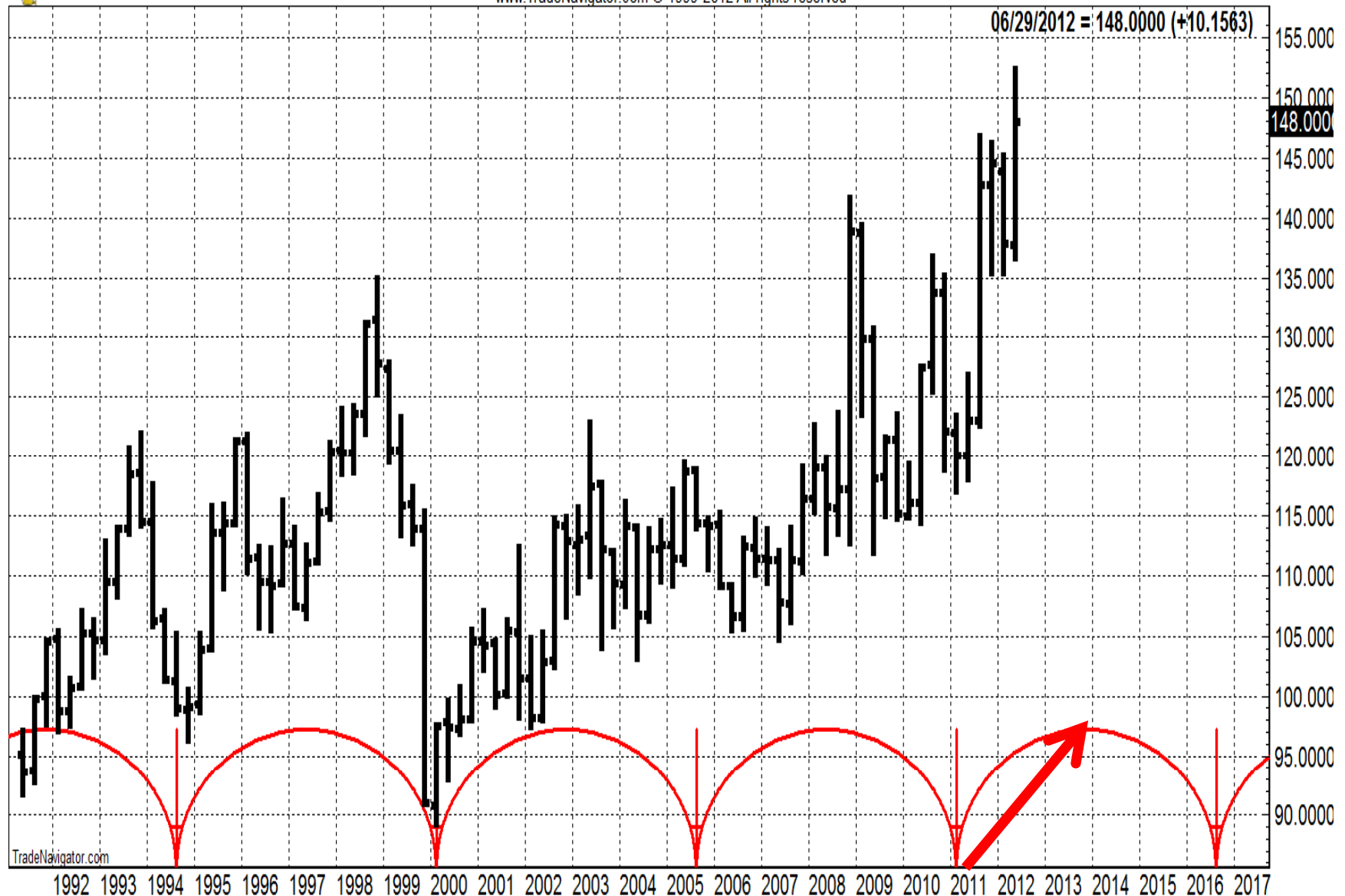


Approx 4.5-5 yr cycle TBonds



ZB-055: T-Bonds 30Yr CBT Elec Cont 1st (Quarterly bars)

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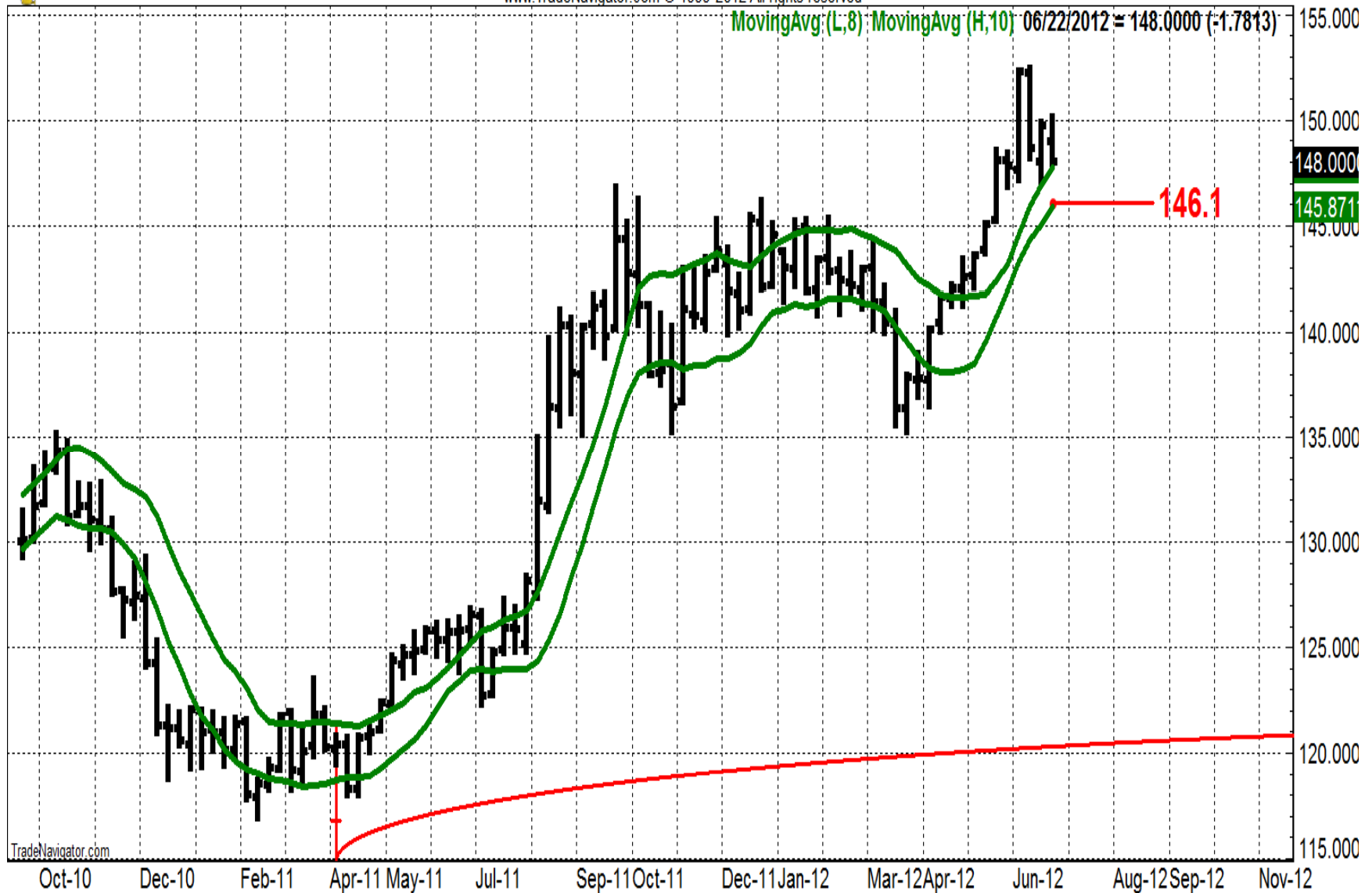


ZB June



ZB-055: T-Bonds 30Yr CBT Elec Cont 1st (Weekly bars)

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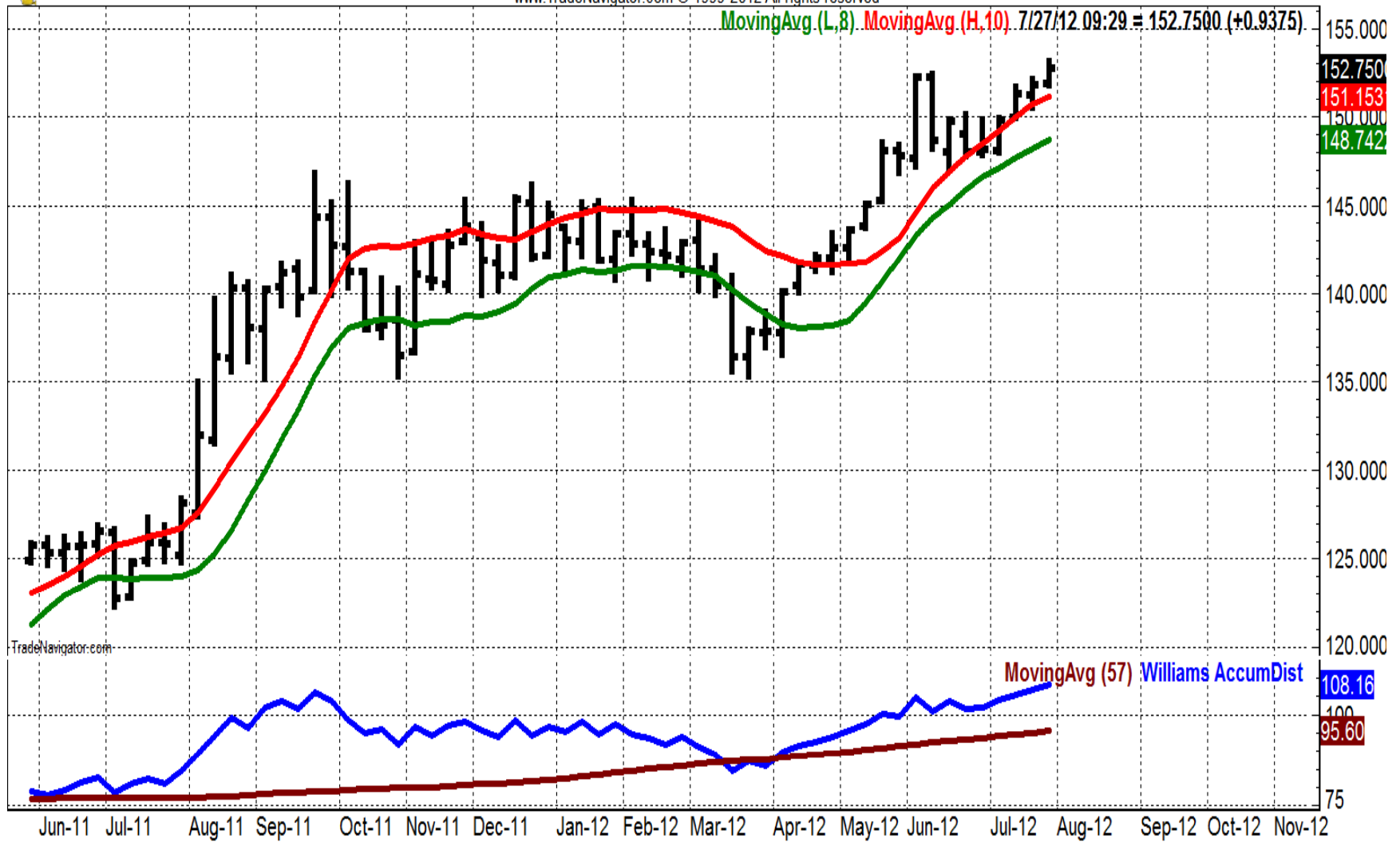


ZB Current



ZB-055: T-Bonds 30Yr CBT Elec Cont 1st (Weekly bars)

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What it means

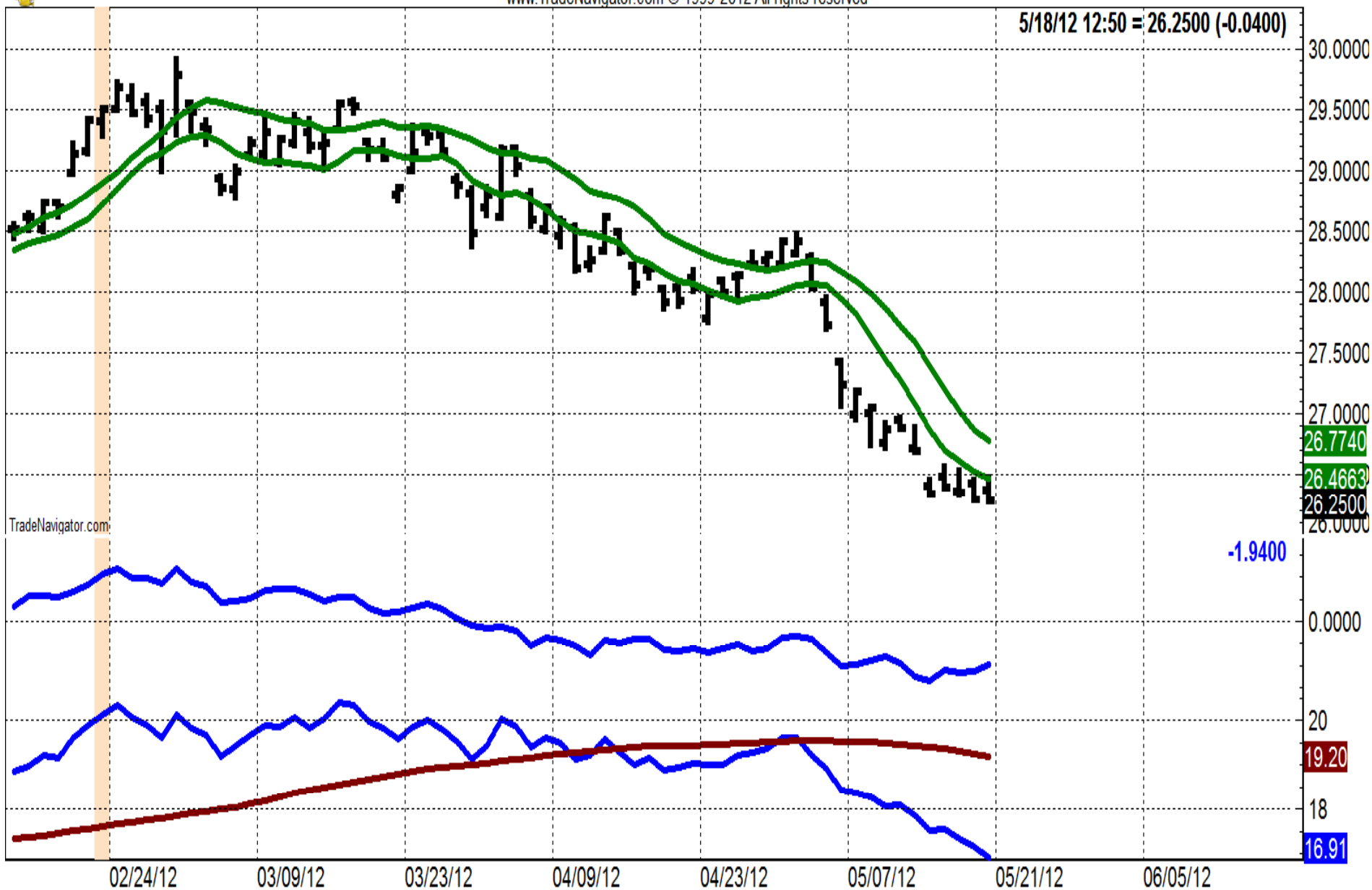
- Rising long term rates will boost borrowing which will signal inflation
- This may not happen until 2013 or late 2012 the soonest and will infect and affect all markets
- How does this correlate with CRB cycle status? Growing inflationary pressures!
- EVIDENCE: Expected Fed Action!
- Note response of gold

CCX	WisdomTree Dreyfus Commodity C
CFD	Nuveen Diversified Commodity F
DBC	PowerShares DB Commodity Index
DDP	PowerShares DB Commodity Short
DEE	PowerShares DB Commodity Doubl
DJP	iPath Dow Jones-UBS Commodity
DPU	PowerShares DB Commodity Long
DYY	PowerShares DB Commodity Doubl
GCC	GreenHaven Continuous Commodity
GSG	iShares S&P GSCI Commodity-Ind
USCI	United States Commodity Index



DBC: PowerShares DB Commodity Index (Daily bars)

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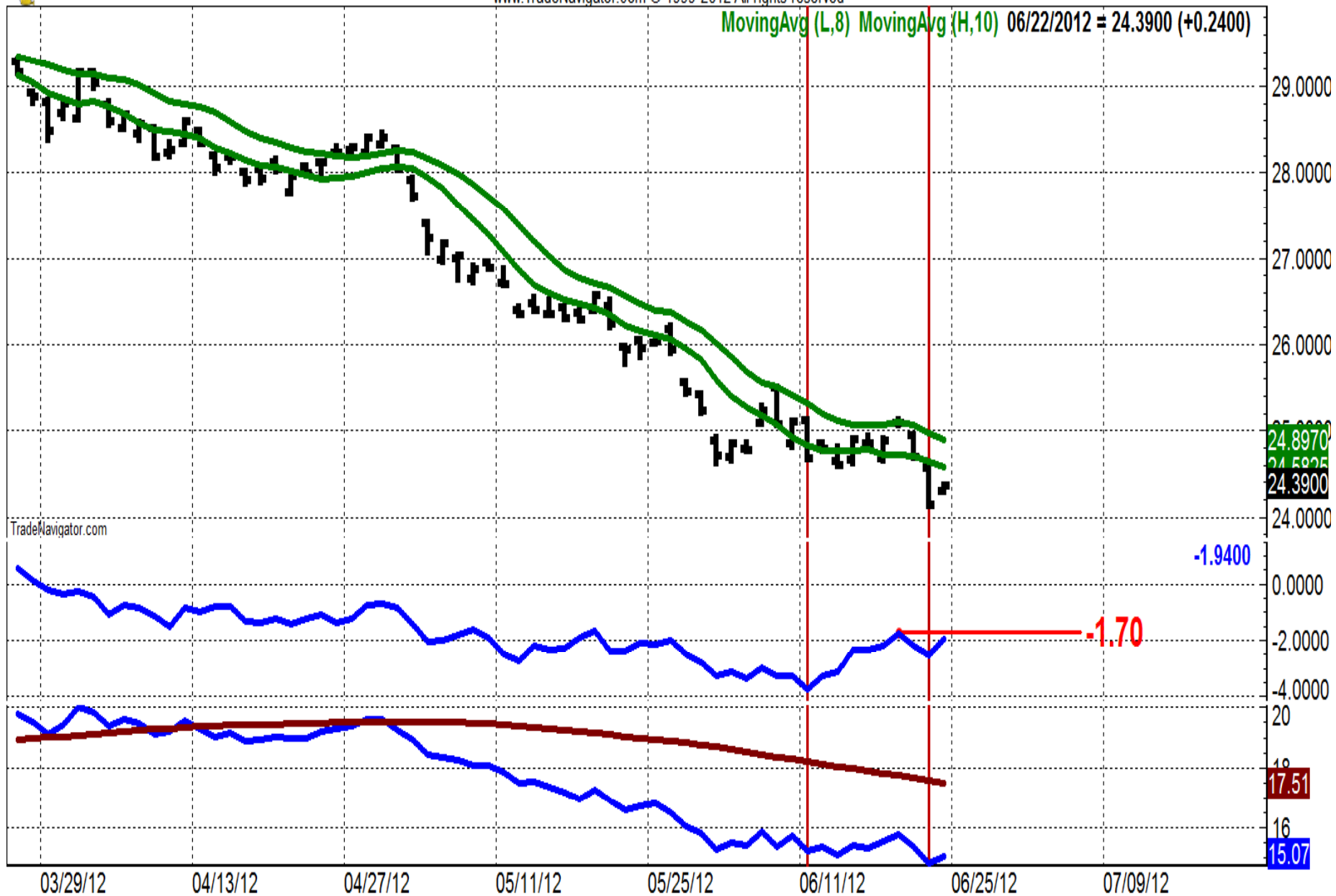




DBC: PowerShares DB Commodity Index (Daily bars)

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MovingAvg (L,8) MovingAvg (H,10) 06/22/2012 = 24.3900 (+0.2400)

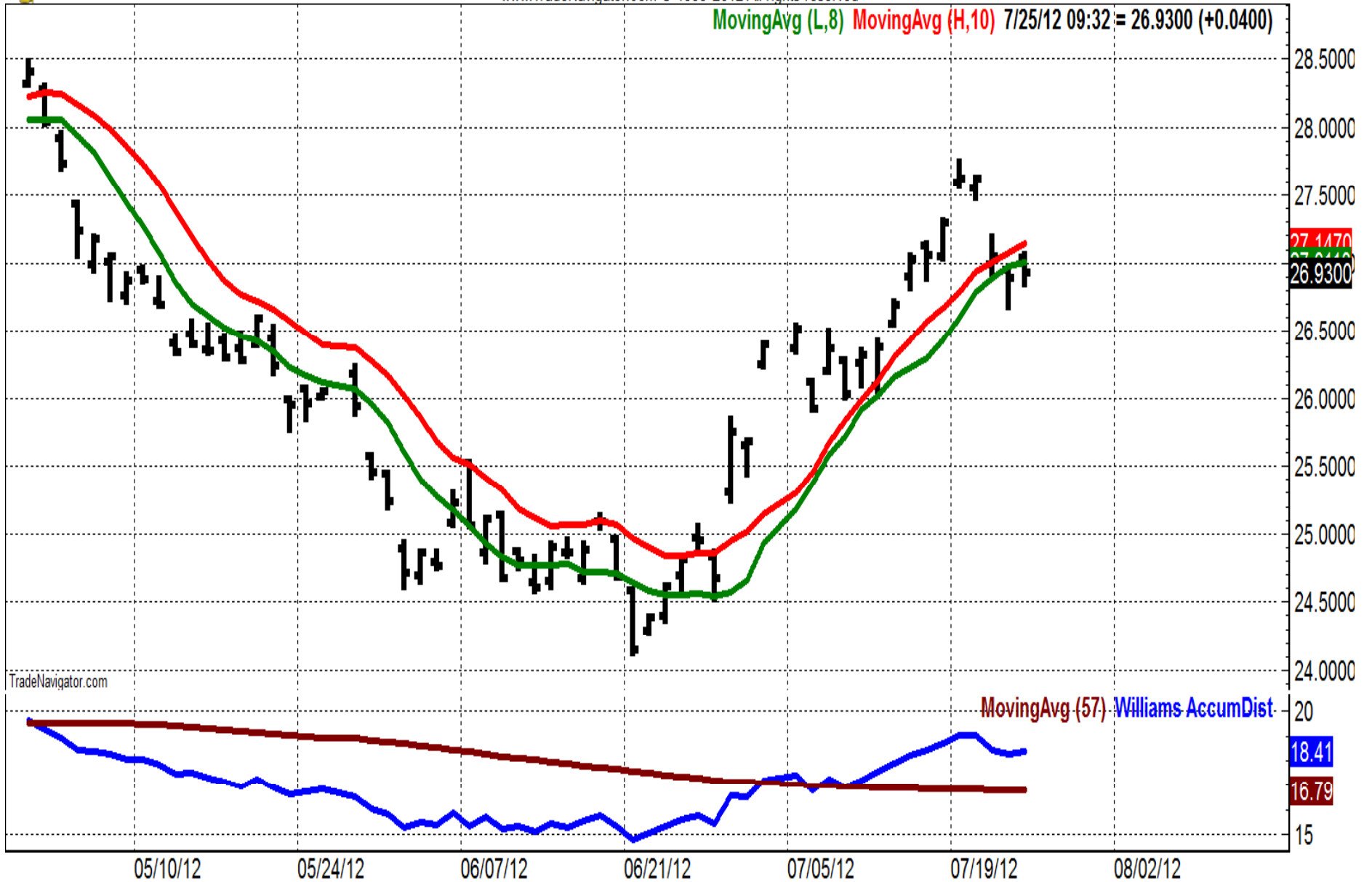




DBC: PowerShares DB Commodity Index (Daily bars)

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MovingAvg (L,8) MovingAvg (H,10) 7/25/12 09:32 = 26.9300 (+0.0400)

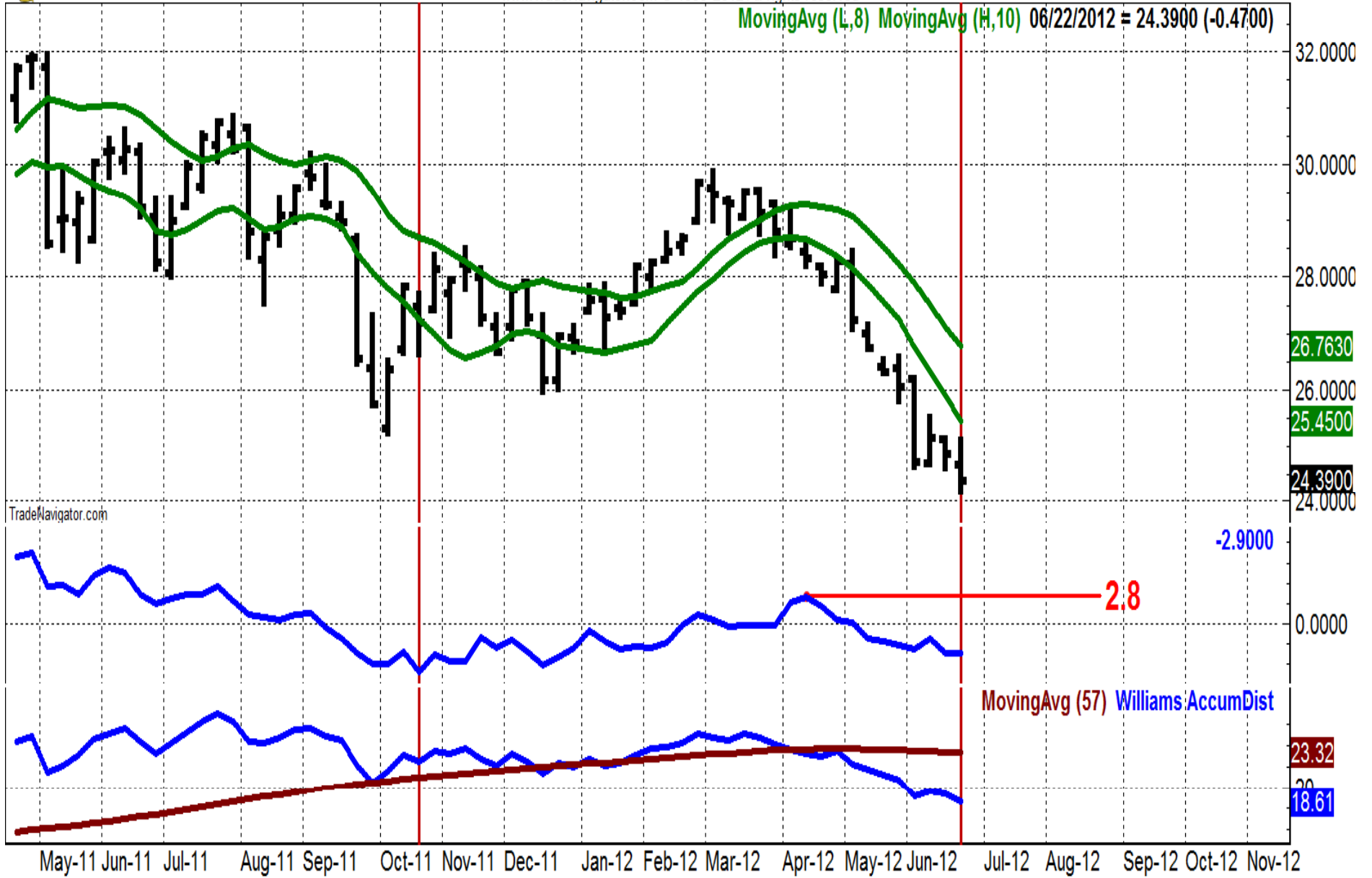




DBC: PowerShares DB Commodity Index (Weekly bars)

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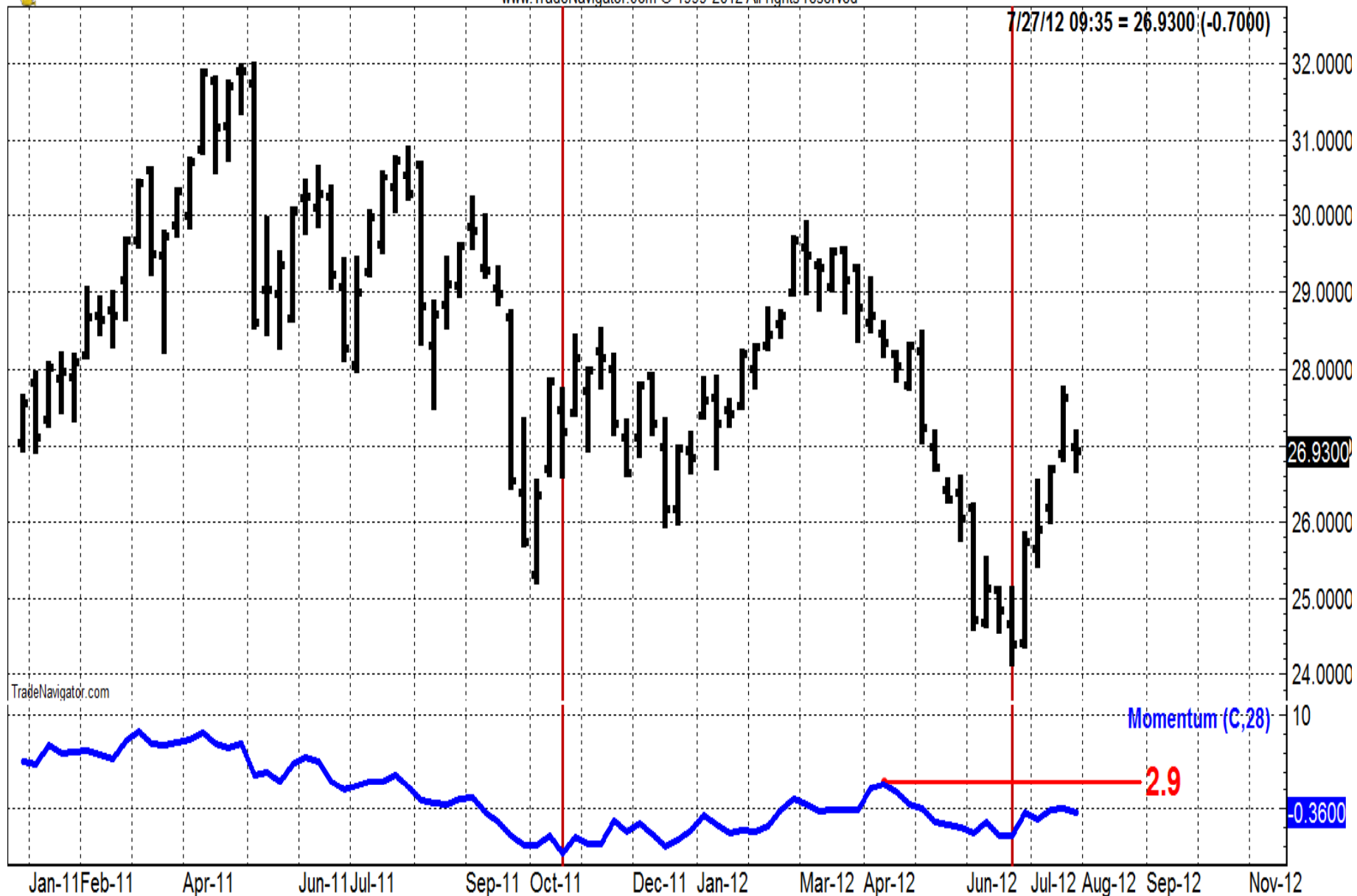
MovingAvg (L,8) MovingAvg (H,10) 06/22/2012 = 24.3900 (-0.4700)





DBC: PowerShares DB Commodity Index (Weekly bars)

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COWS

Corn

Soybeans

Wheat

**The forecast was: expect explosive moves
with new all time highs possible**

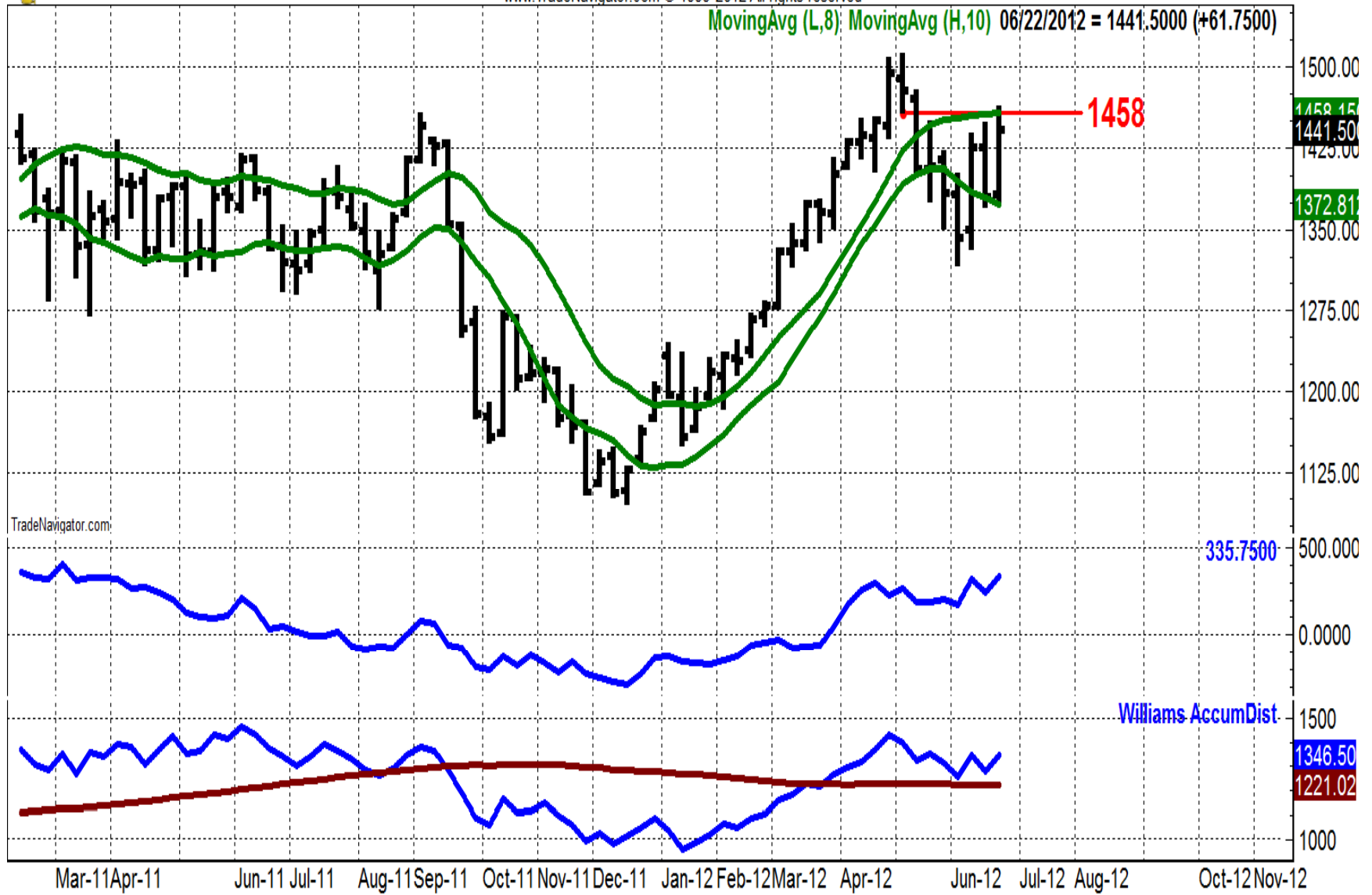
**Critical factor: WEEKLY close above July
highs in Nov soybeans and or Dec corn**



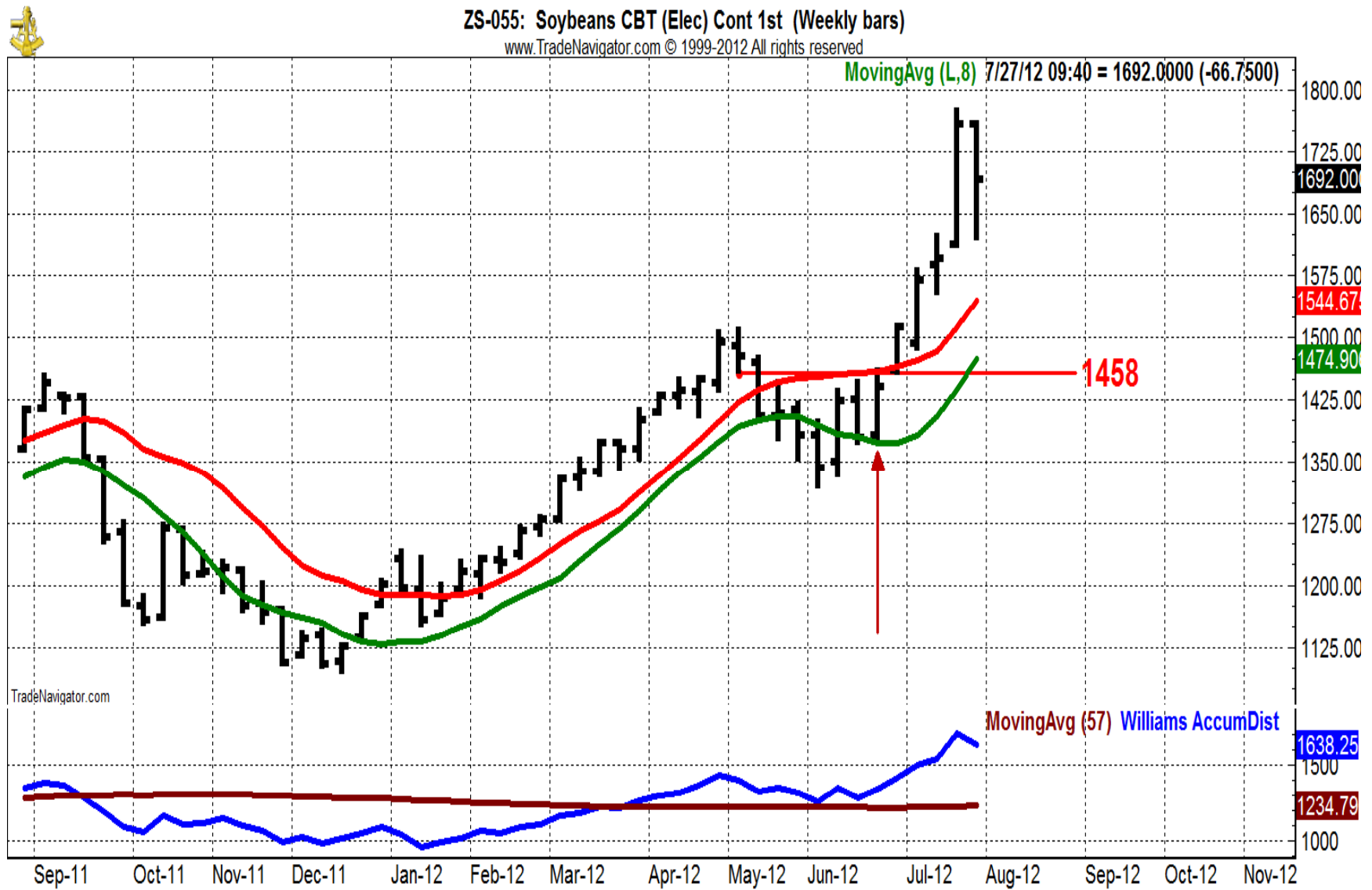
ZS-055: Soybeans CBT (Elec) Cont 1st (Weekly bars)

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MovingAvg (L,8); MovingAvg (H,10) 06/22/2012 = 1441.5000 (+61.7500)



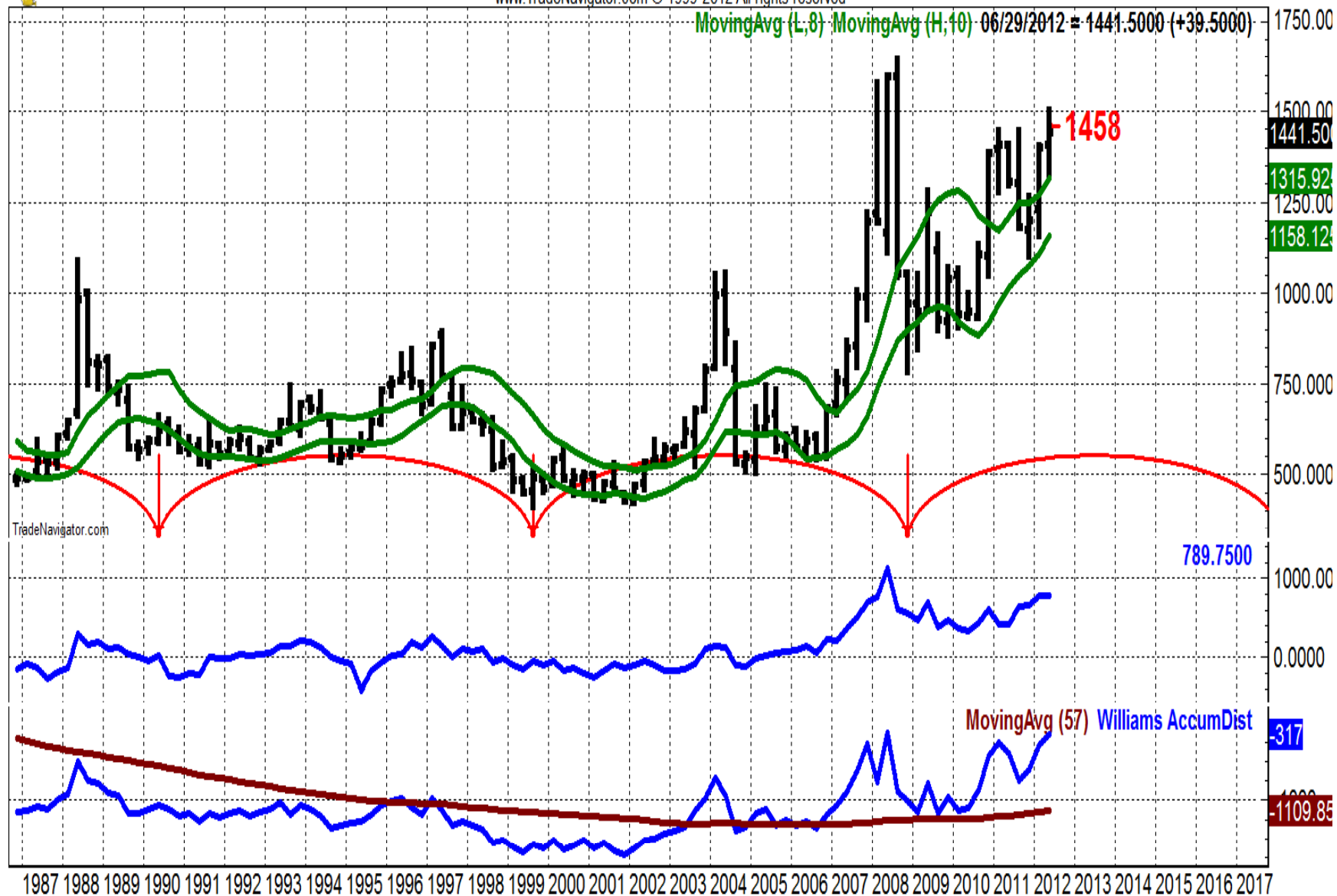
What happened?





ZS-055: Soybeans CBT (Elec) Cont 1st (Quarterly bars)

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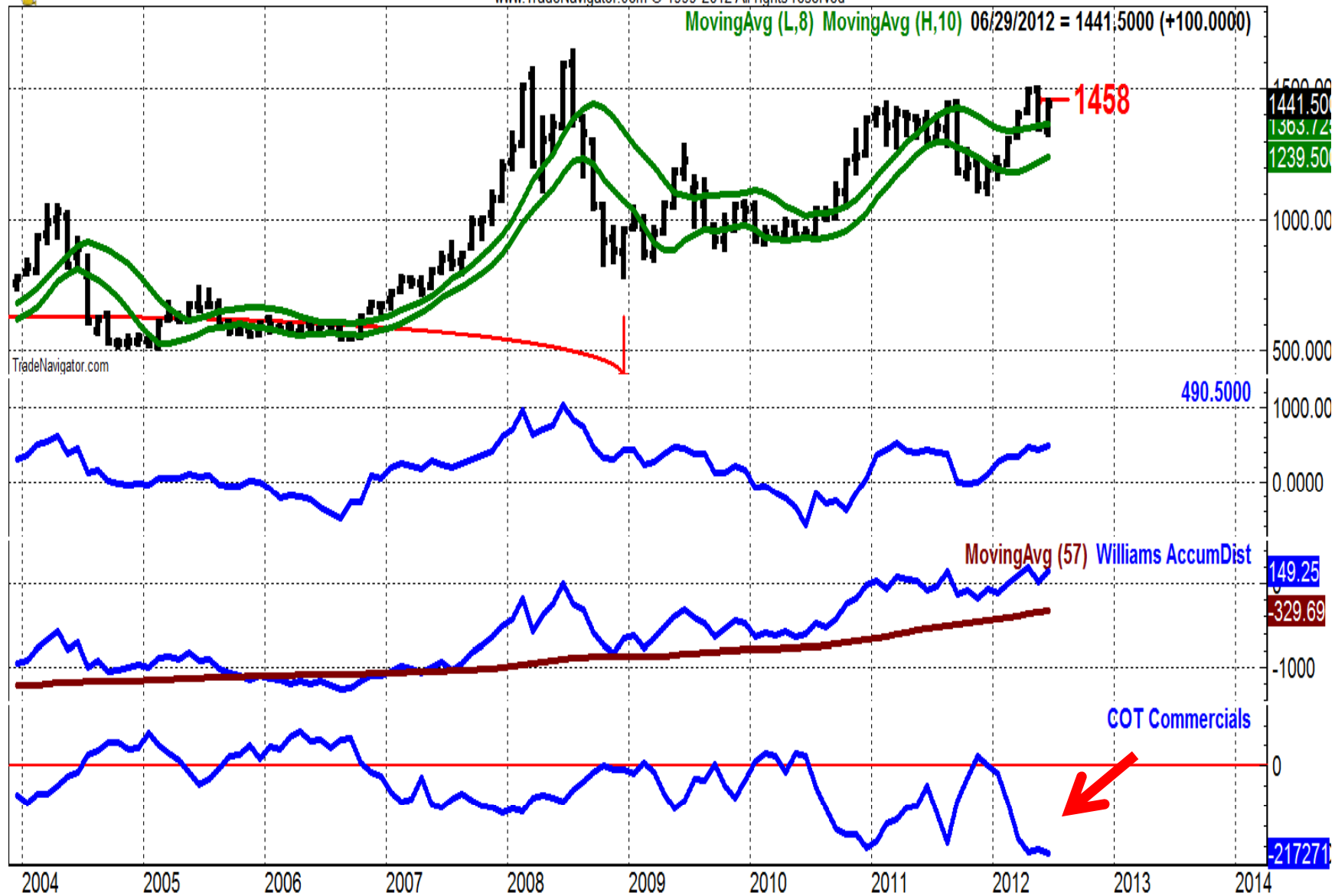




ZS-055: Soybeans CBT (Elec) Cont 1st (Monthly bars)

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MovingAvg (L,8) MovingAvg (H,10) 06/29/2012 = 1441.5000 (+100.0000)

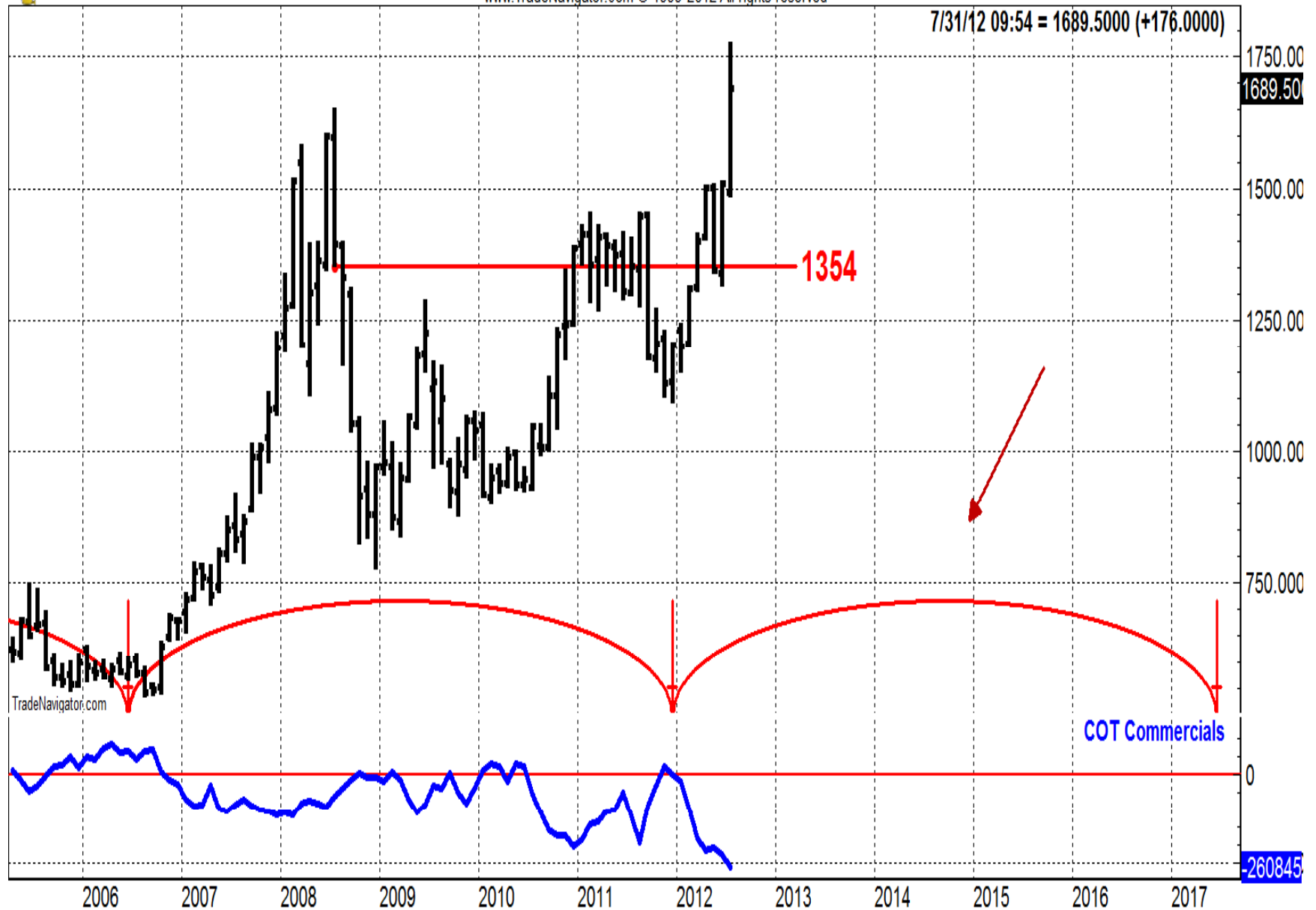




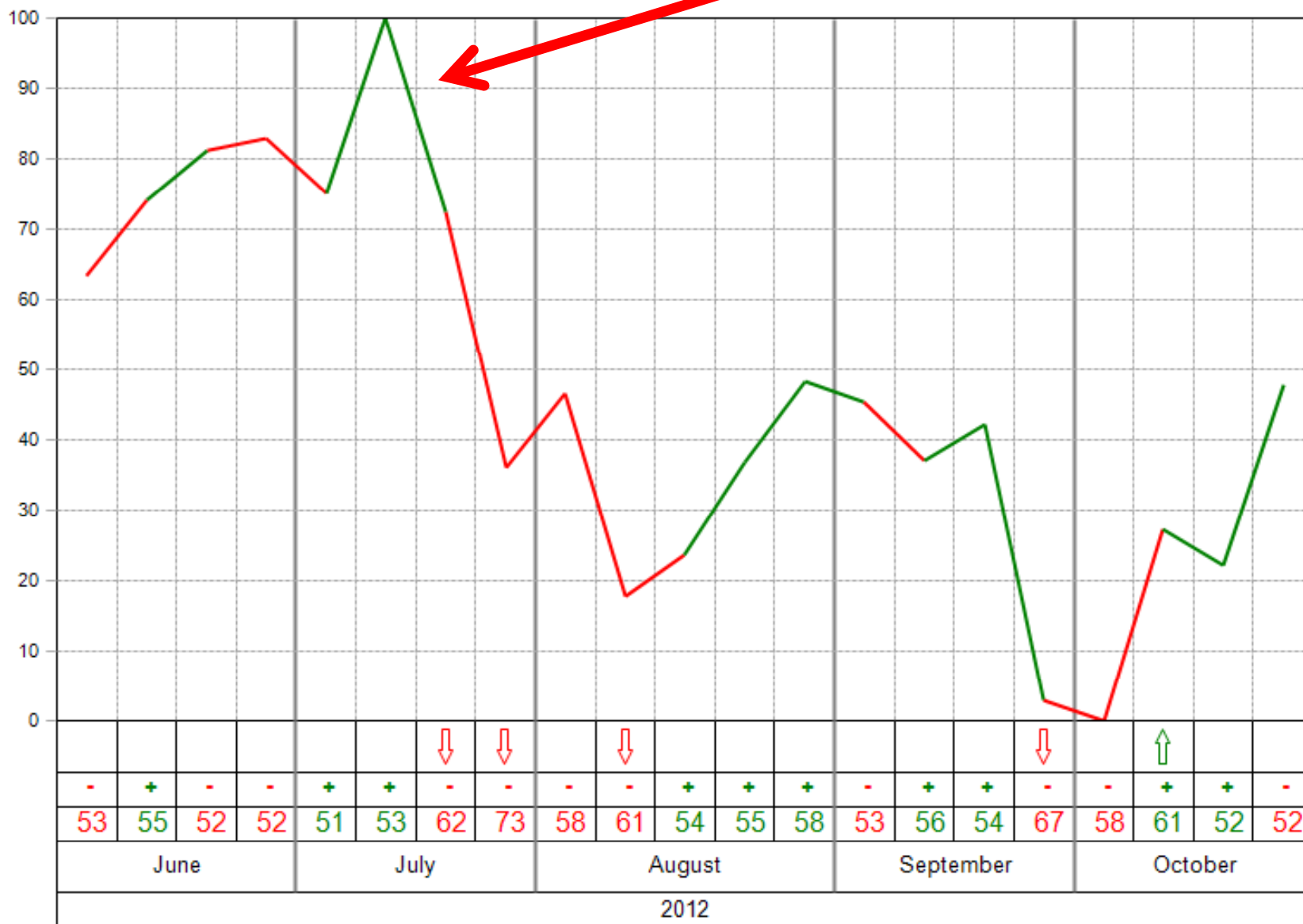
ZS-055: Soybeans CBT (Elec) Cont 1st (Monthly bars)

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7/31/12 09:54 = 1689.5000 (+176.0000)



WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : November - Soybeans 1960 - 2012

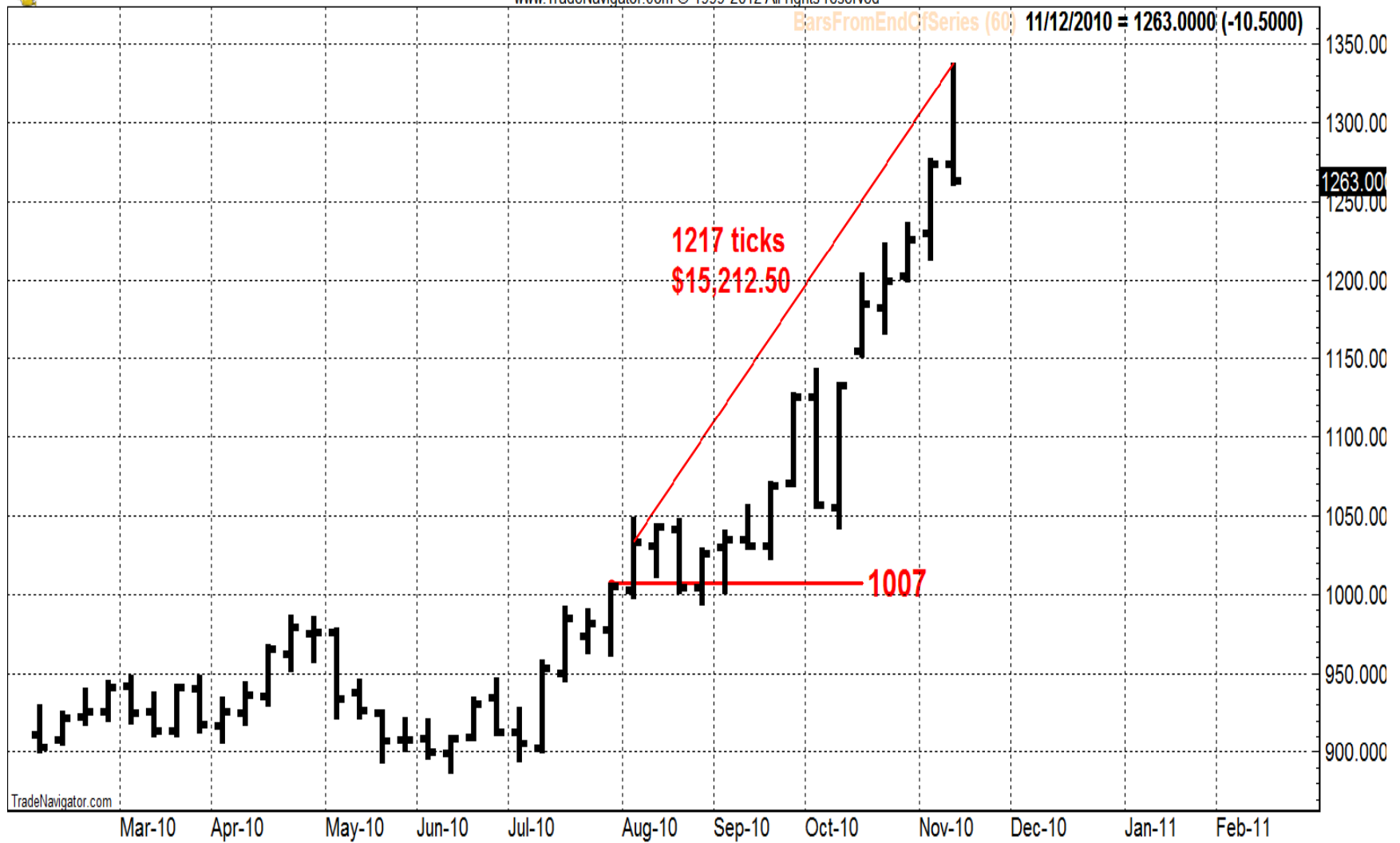


Monthly close above Jly high 2010



ZS-201011: Soybeans CBT (Elec) Nov 2010 (Weekly bars)

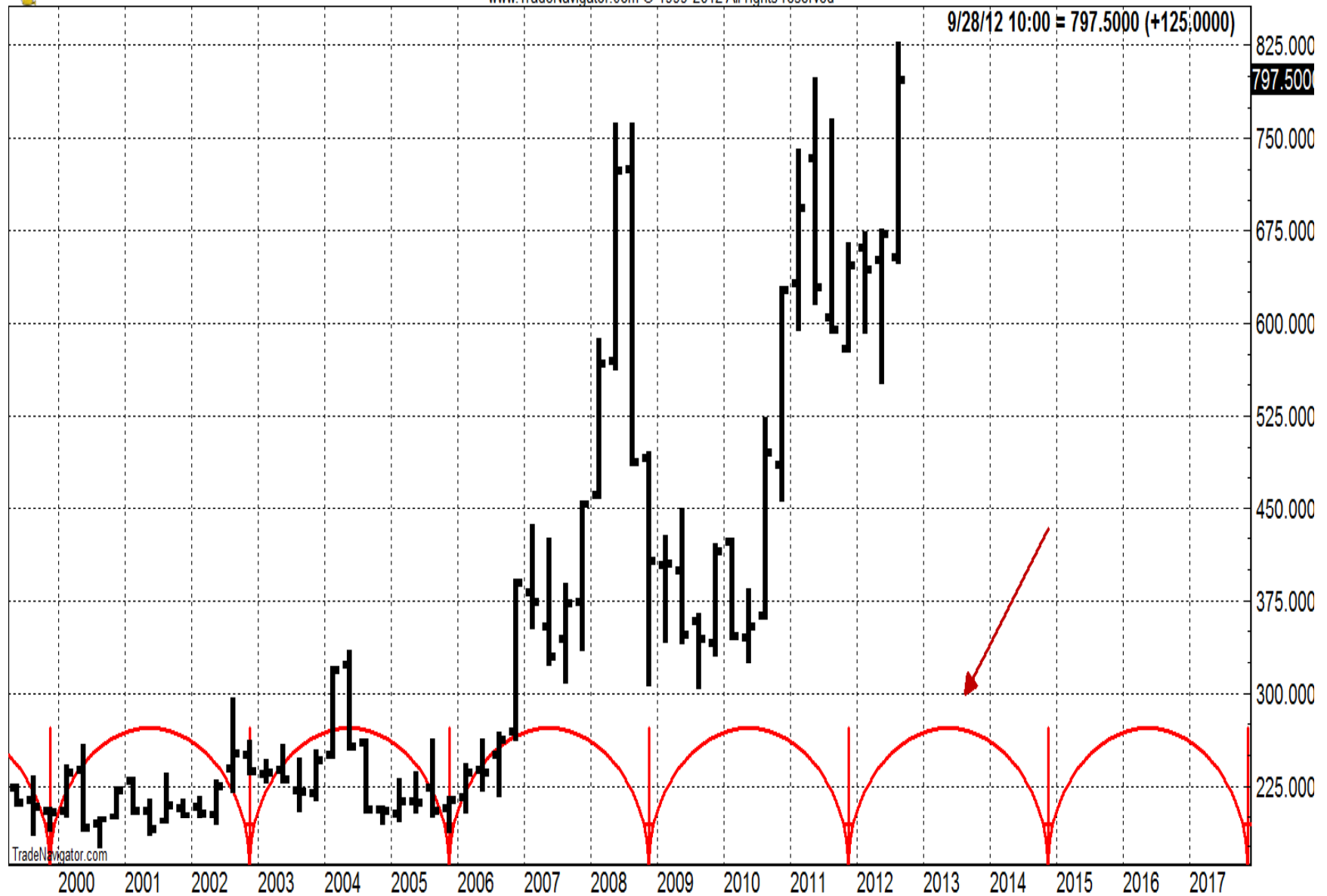
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C-055: Corn CBT (Pit) Cont 1st (Quarterly bars)

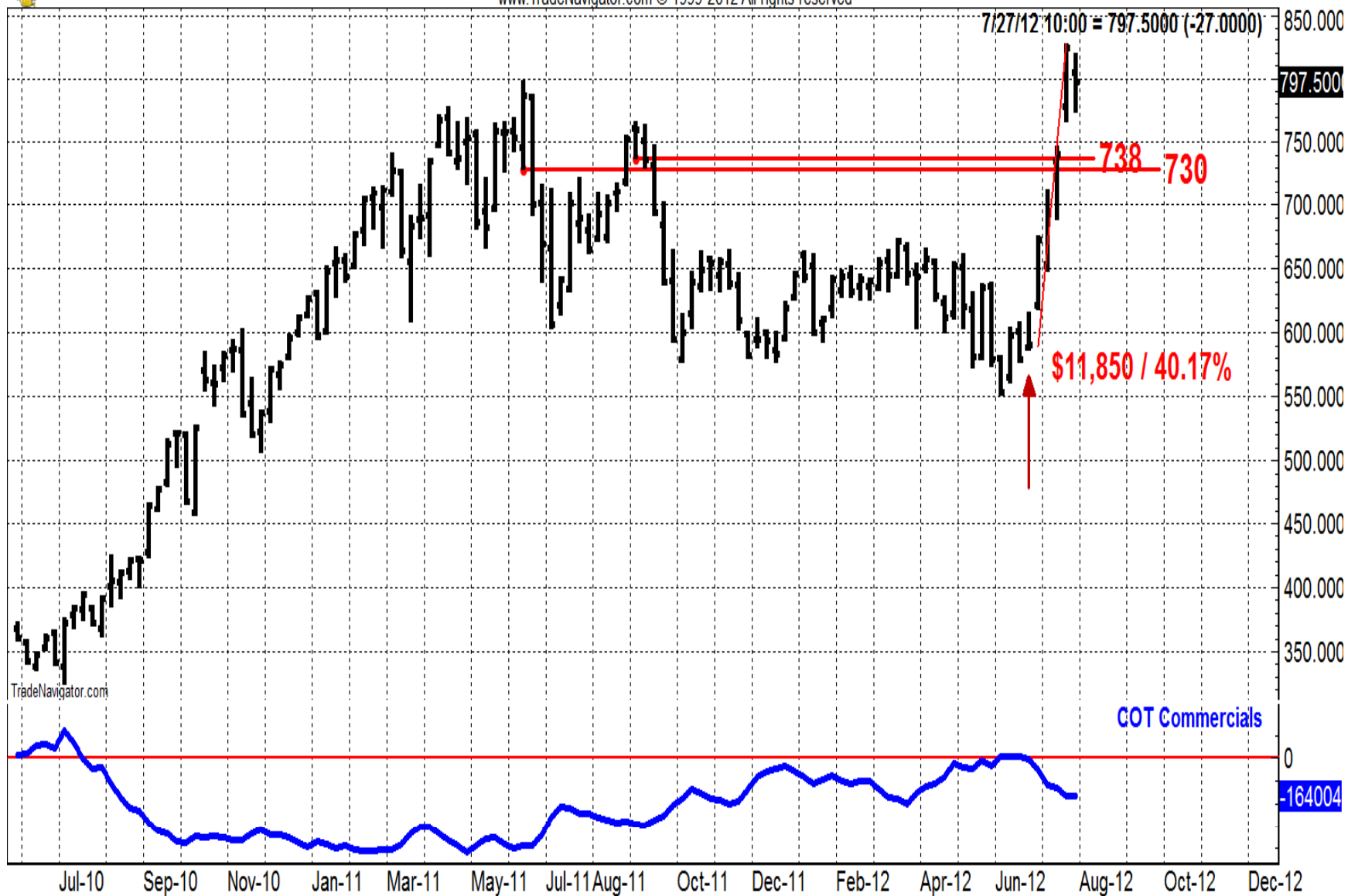
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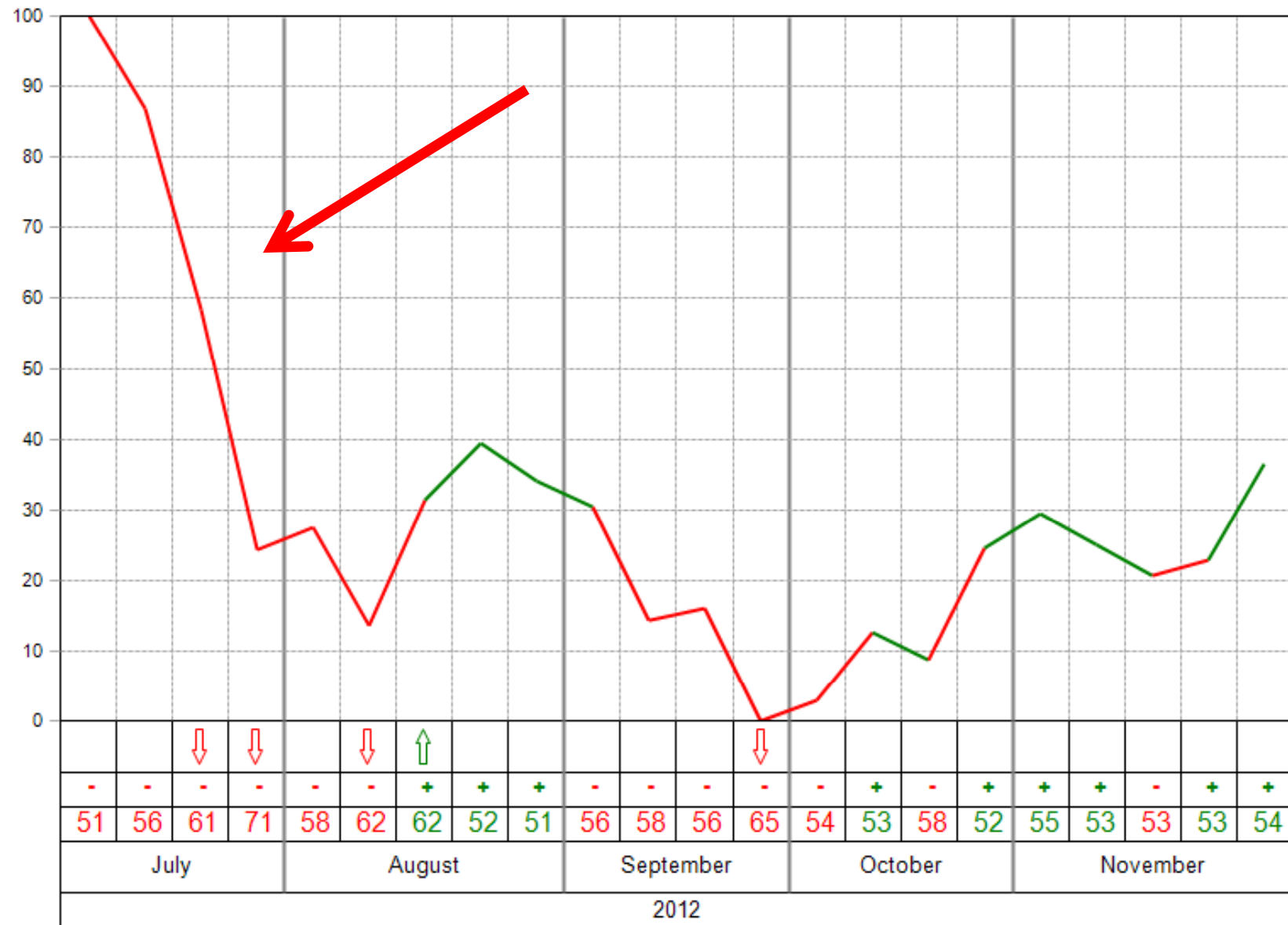


C-055: Corn CBT (Pit) Cont 1st (Weekly bars)

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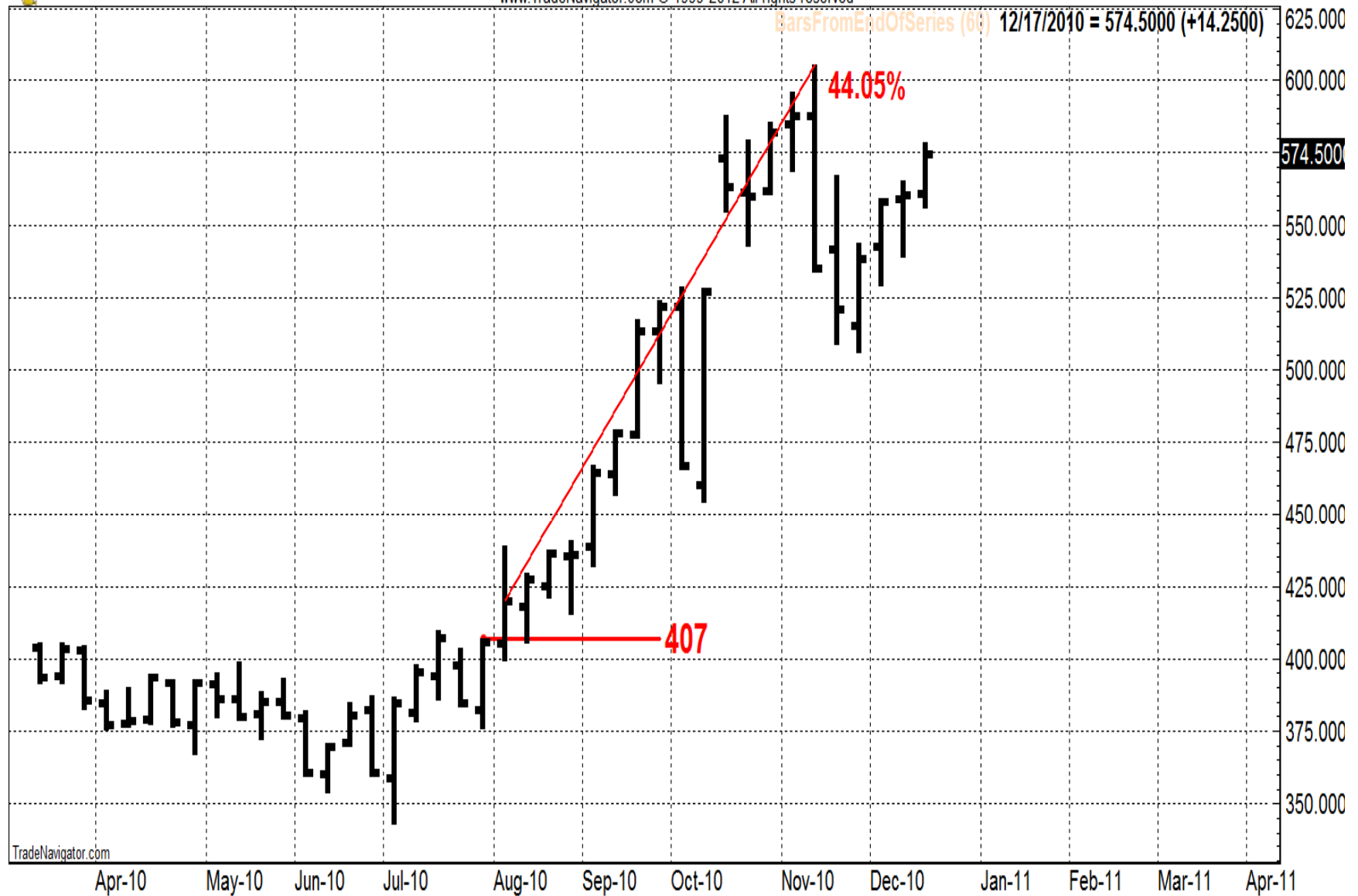
WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - Corn 1960 - 2012





ZC-201012: Corn CBT (Elec) Dec 2010 (Weekly bars)

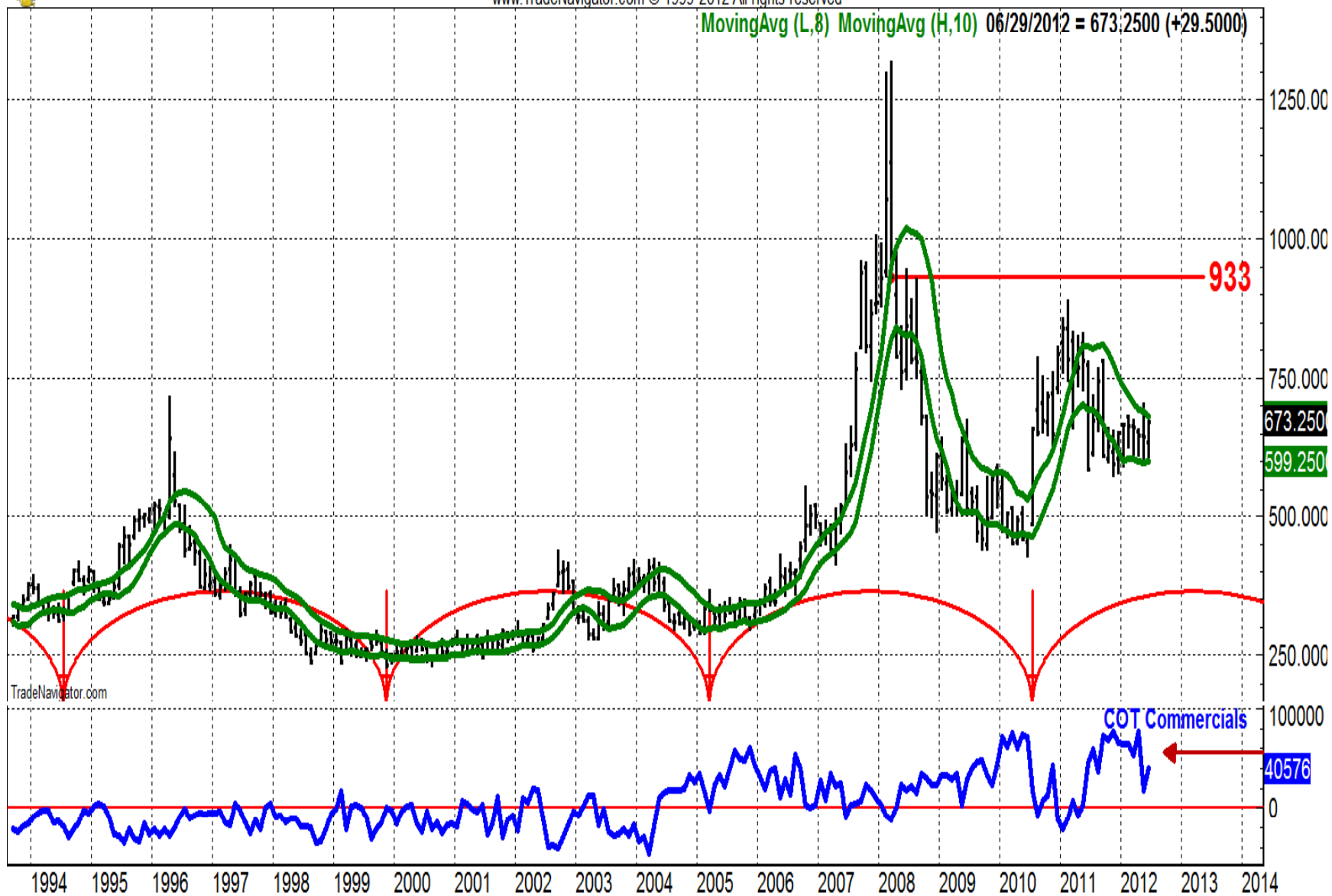
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W-055: Wheat CBT (Pit) Cont 1st (Monthly bars)

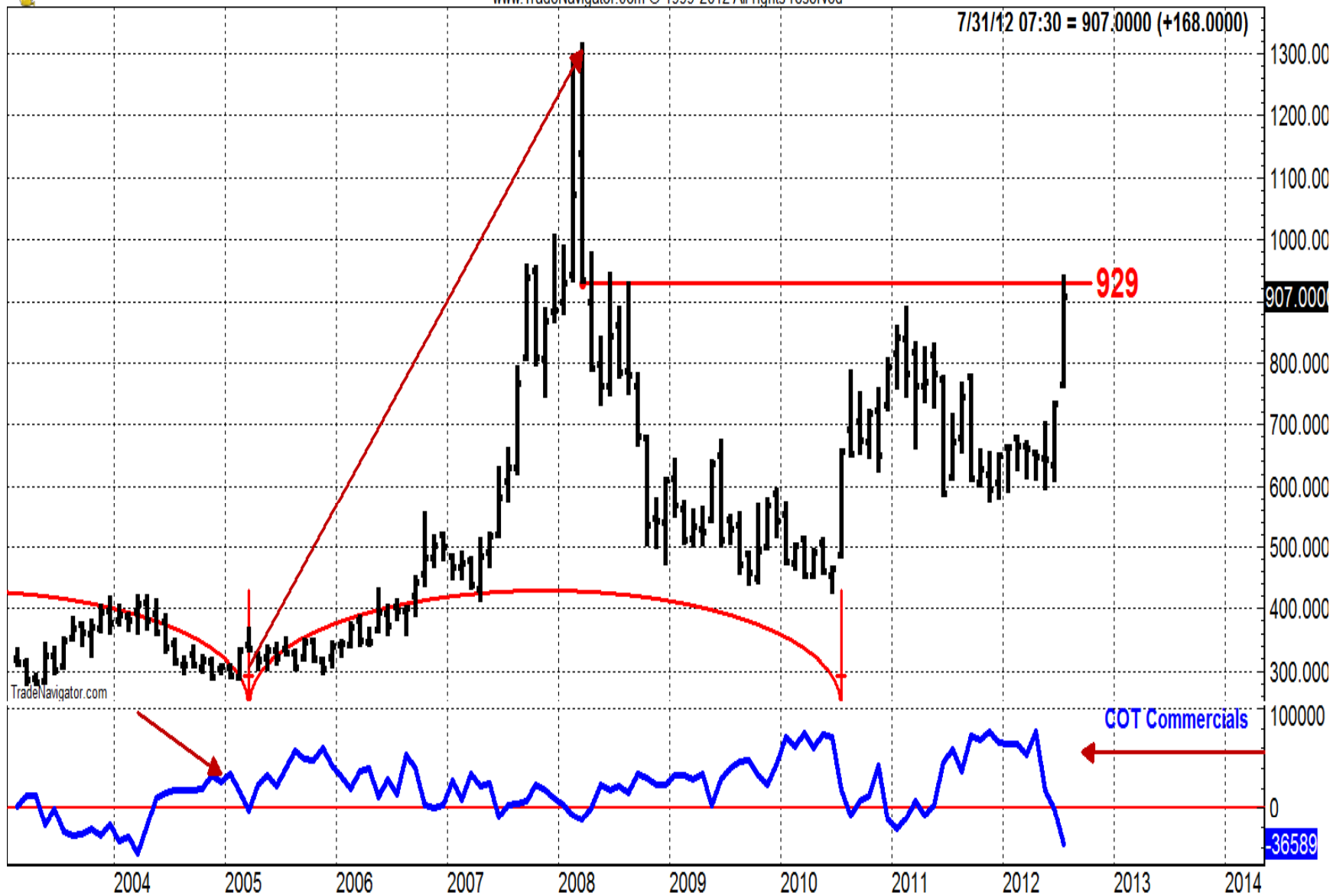
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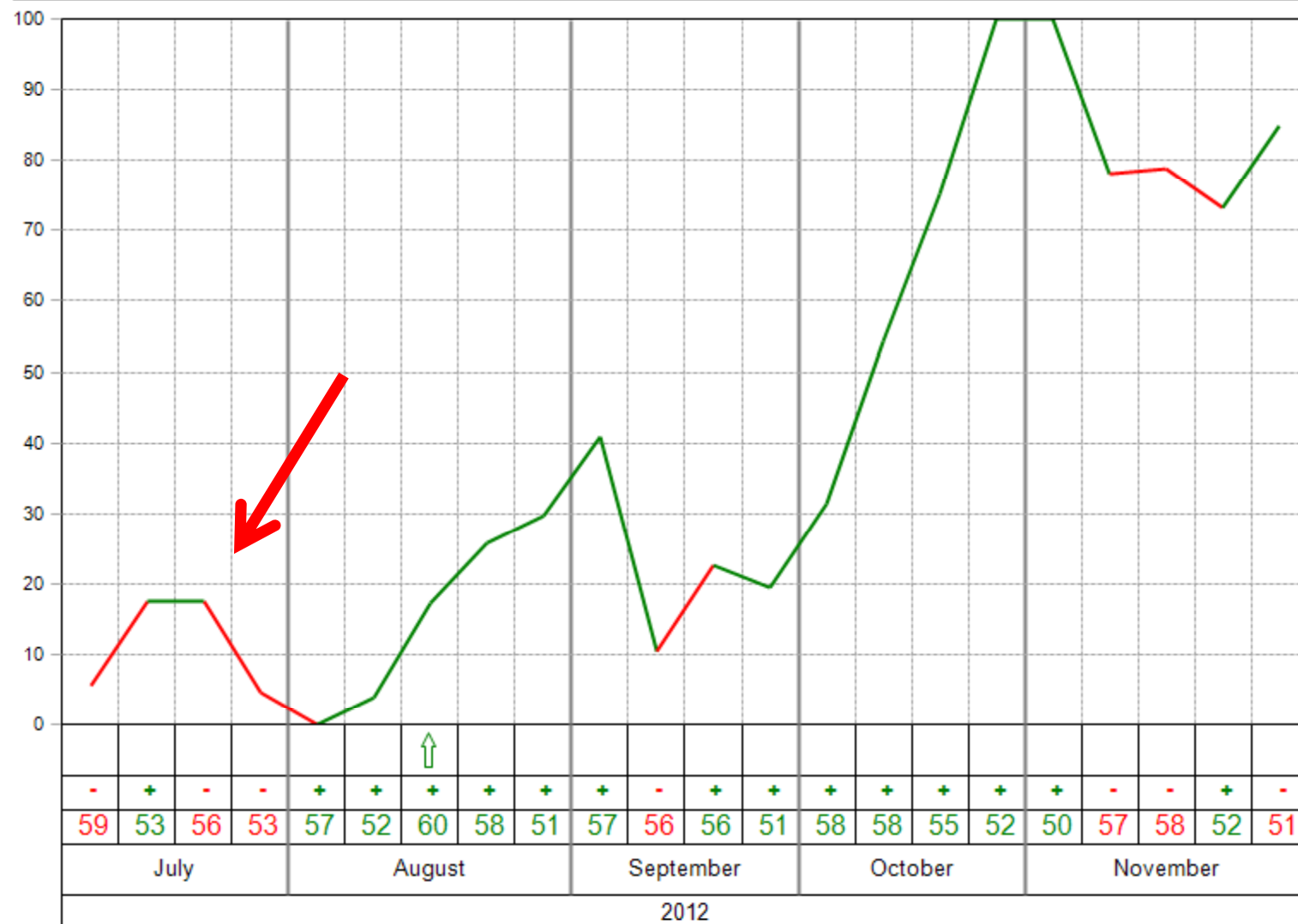


W-055: Wheat CBT (Pit) Cont 1st (Monthly bars)

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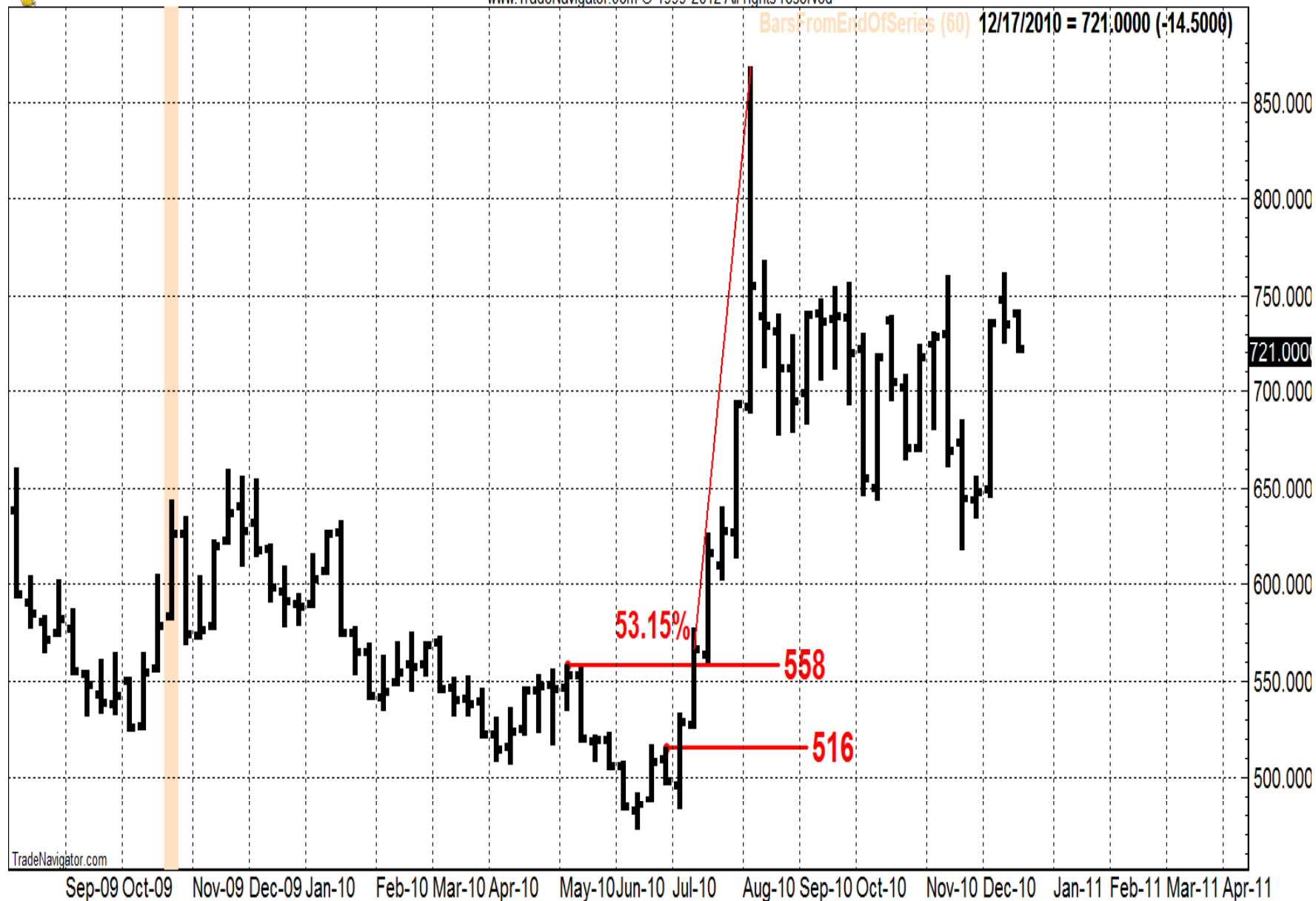
WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - Wheat 1959 - 2012





ZW-201012: Wheat CBT (Elec) Dec 2010 (Weekly bars)

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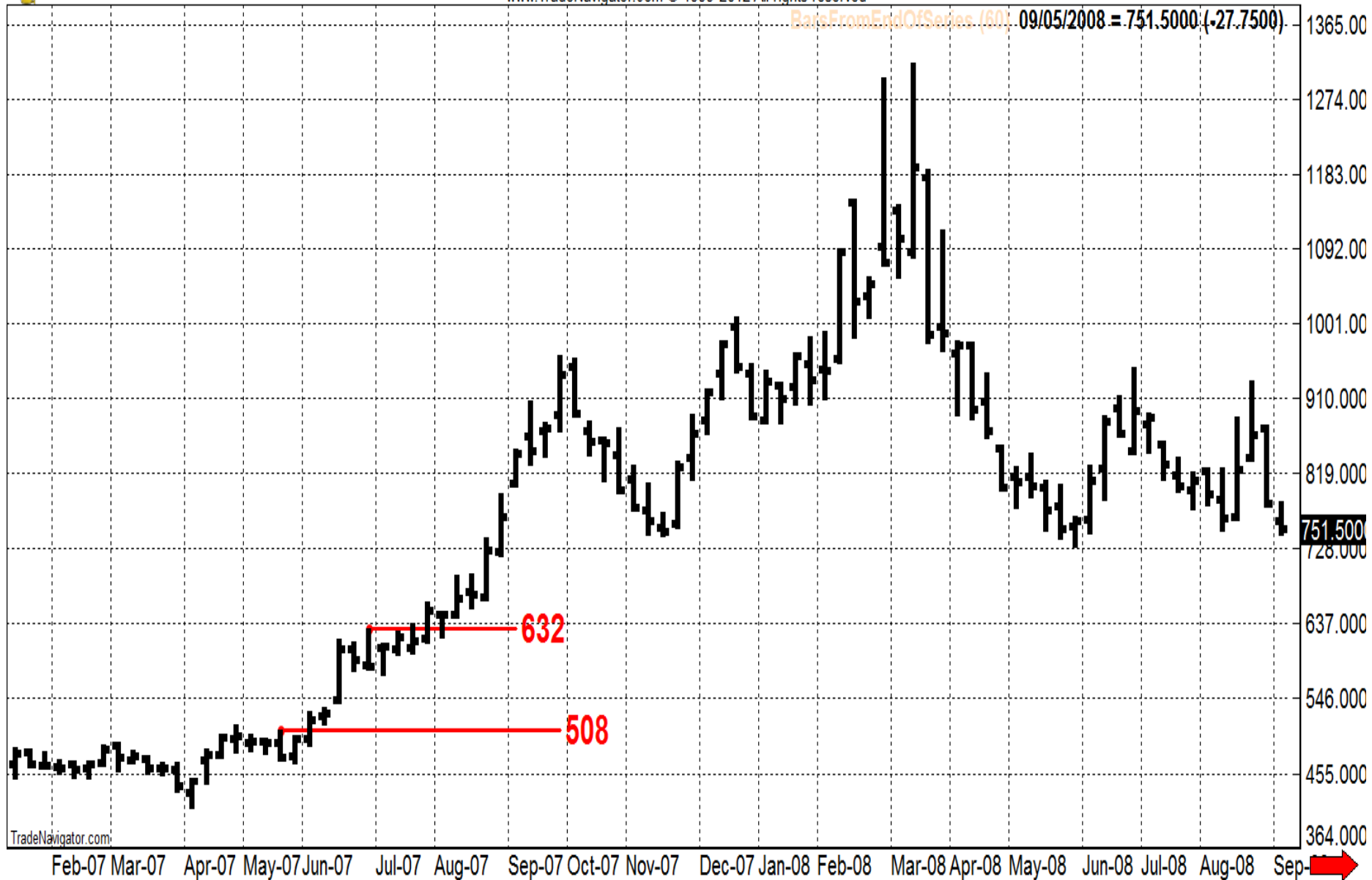




W-055: Wheat CBT (Pit) Cont 1st (Weekly bars)

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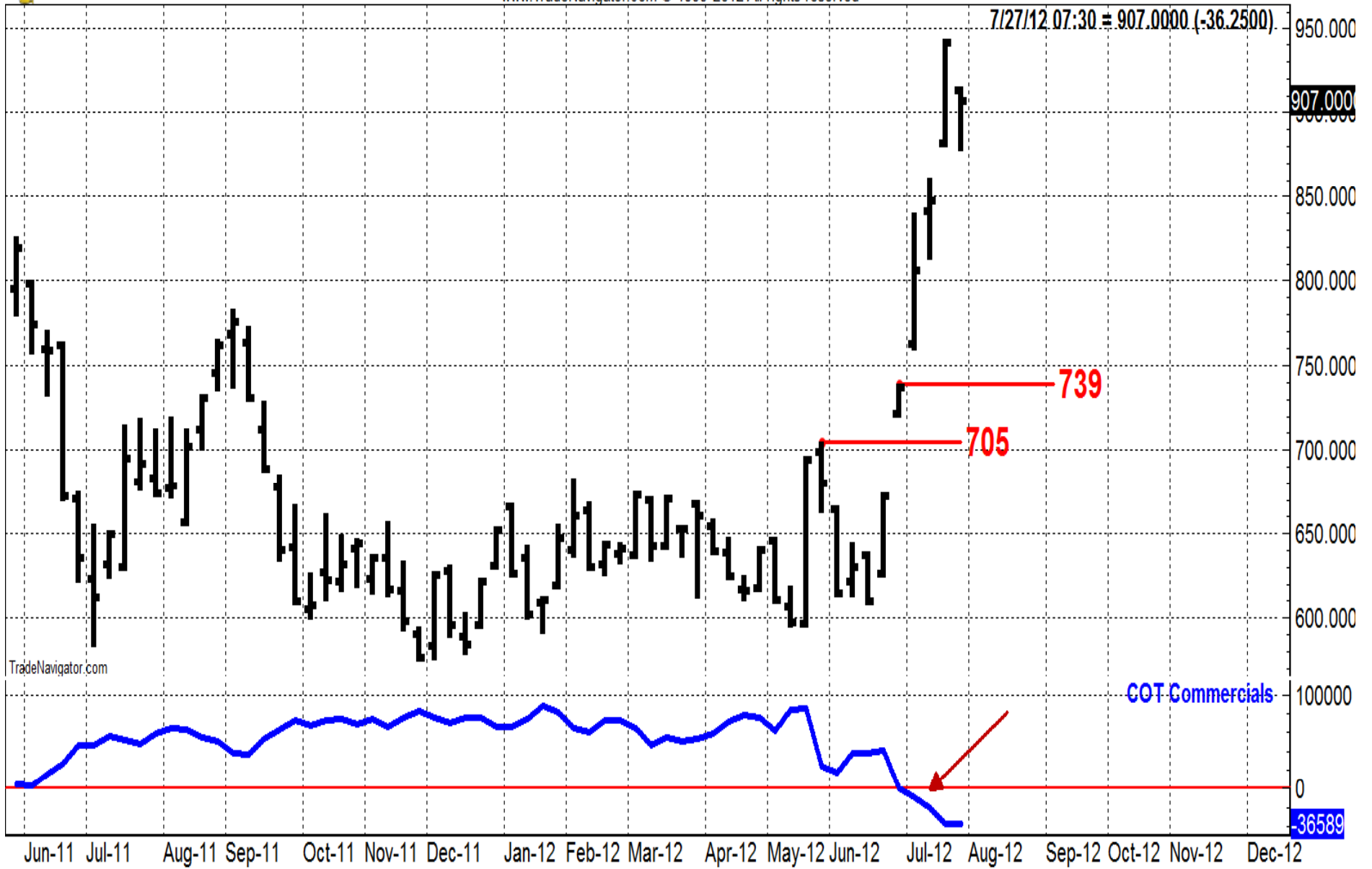
Bars From End Of Series (60): 09/05/2008 = 751.5000 (-27.7500)





W-055: Wheat CBT (Pit) Cont 1st (Weekly bars)

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STOCKS AS PROXIES OR ETFS FOR GRAINS

JJG

ADM

ANDE

BG

POT

ANR

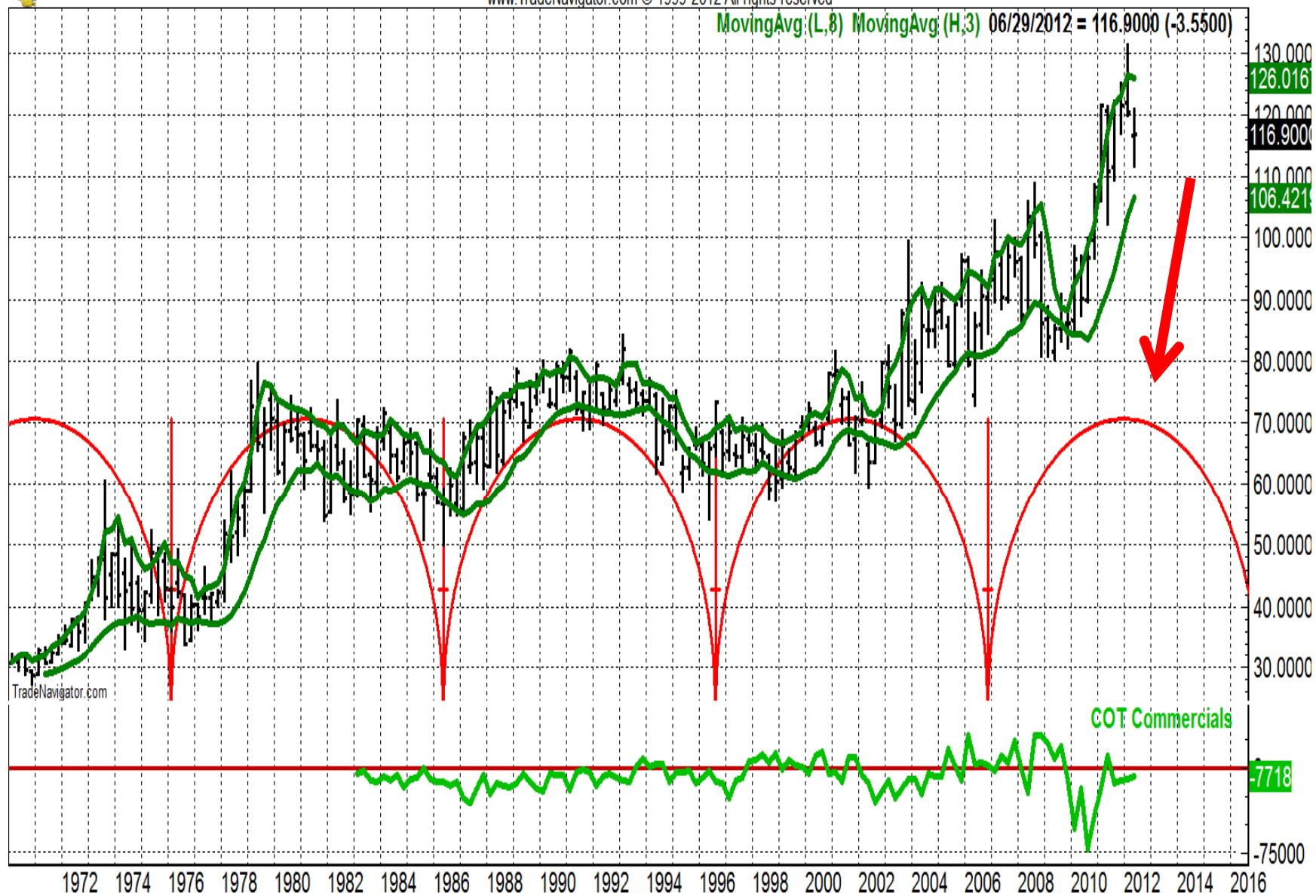
MOS

- Meats
- Cattle
- Hogs

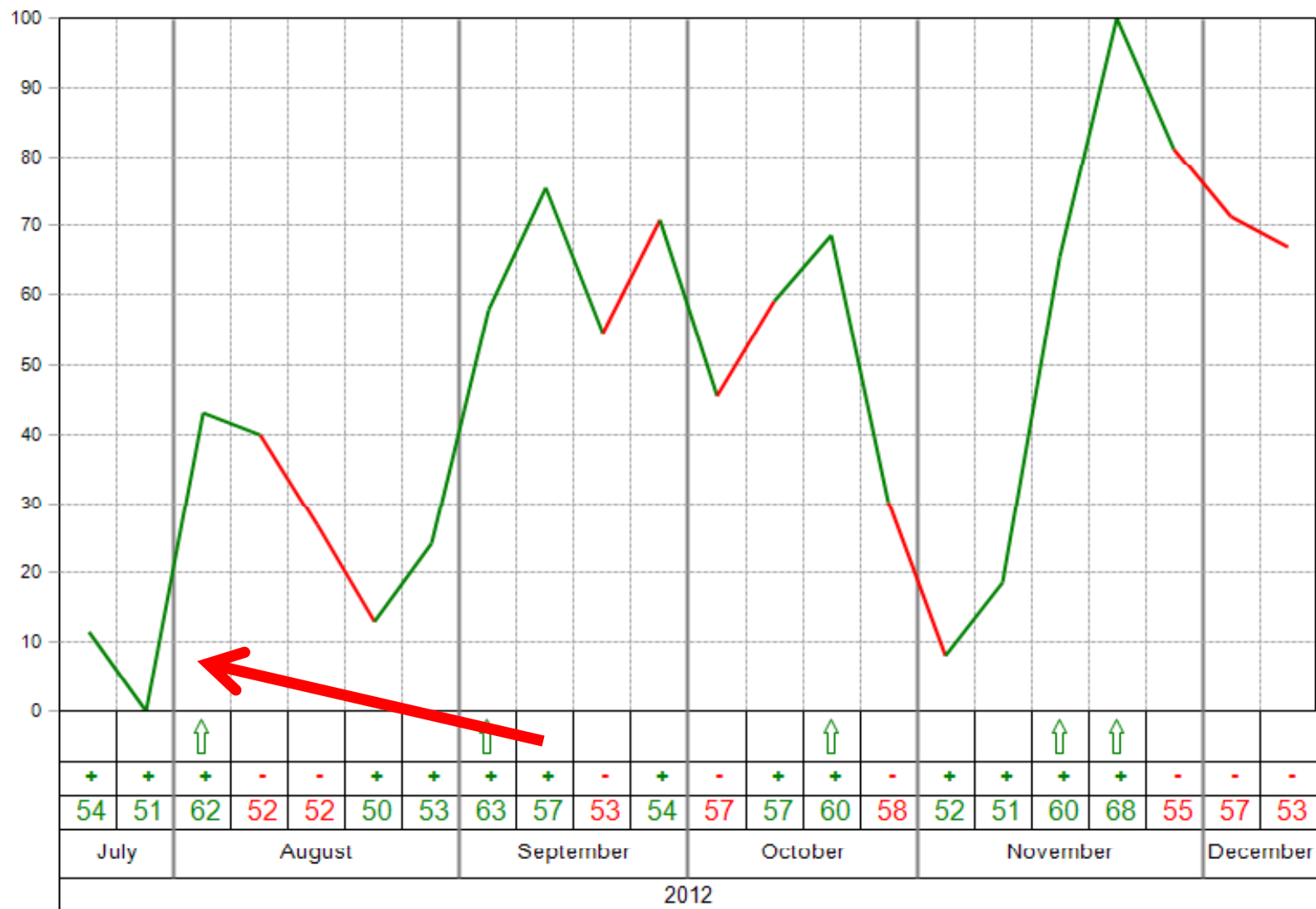


LC-055: Live Cattle (Pit) Cont 1st (Quarterly bars)

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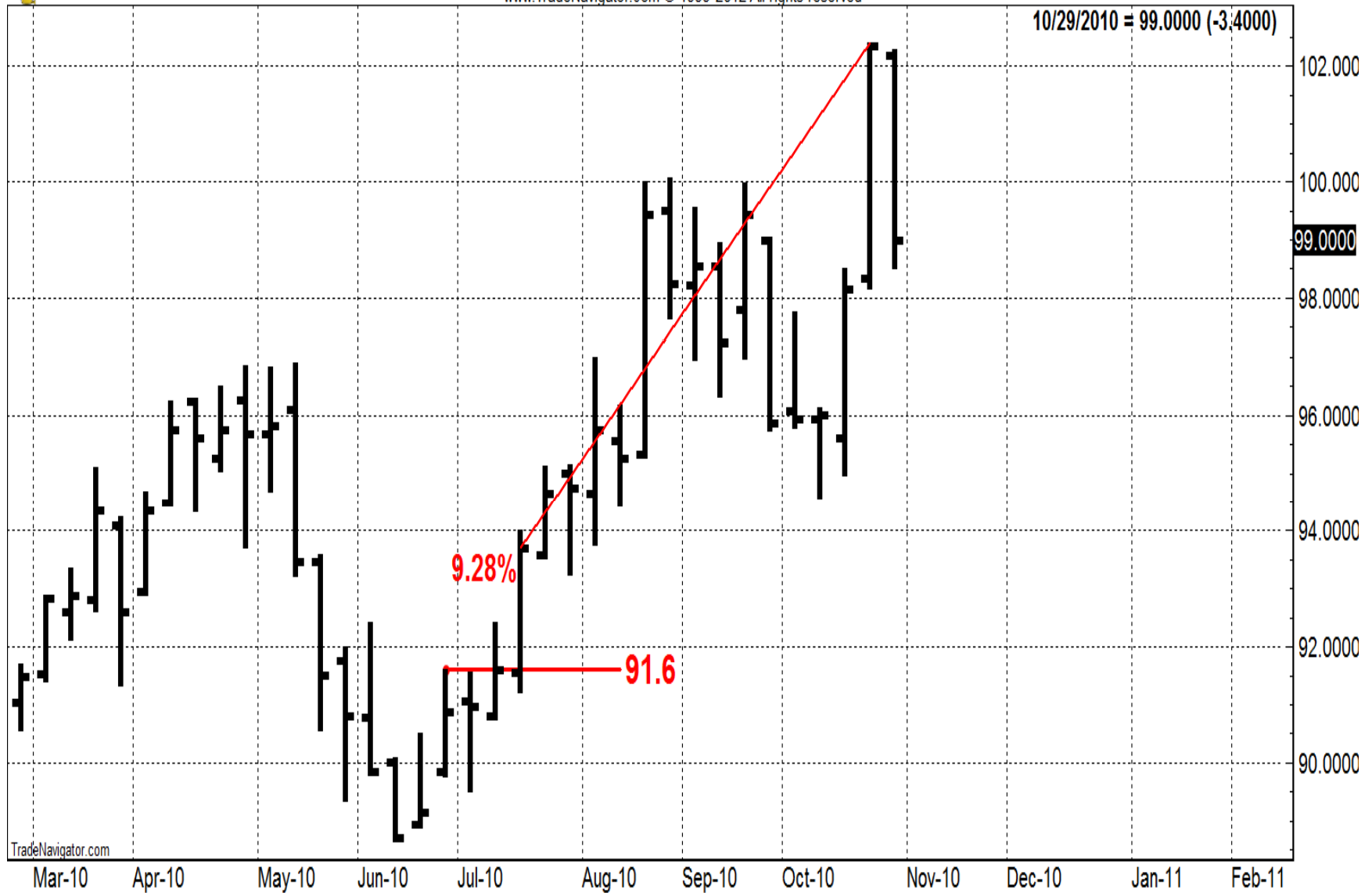
WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - Live Cattle 1959 - 2012





LE-201010: Live Cattle (Elec) Oct 2010 (Weekly bars)

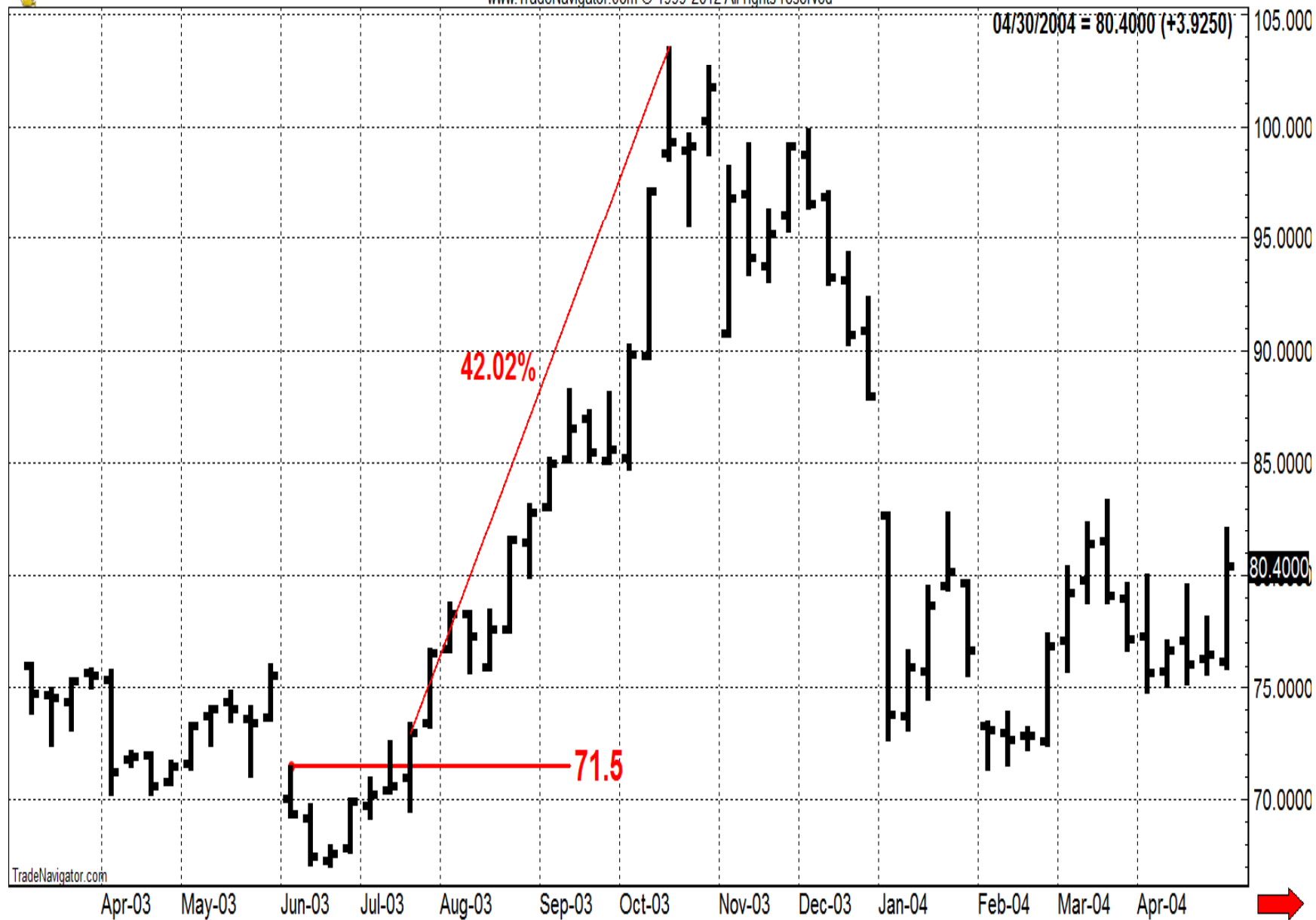
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LE-055: Live Cattle (Elec) Cont 1st (Weekly bars)

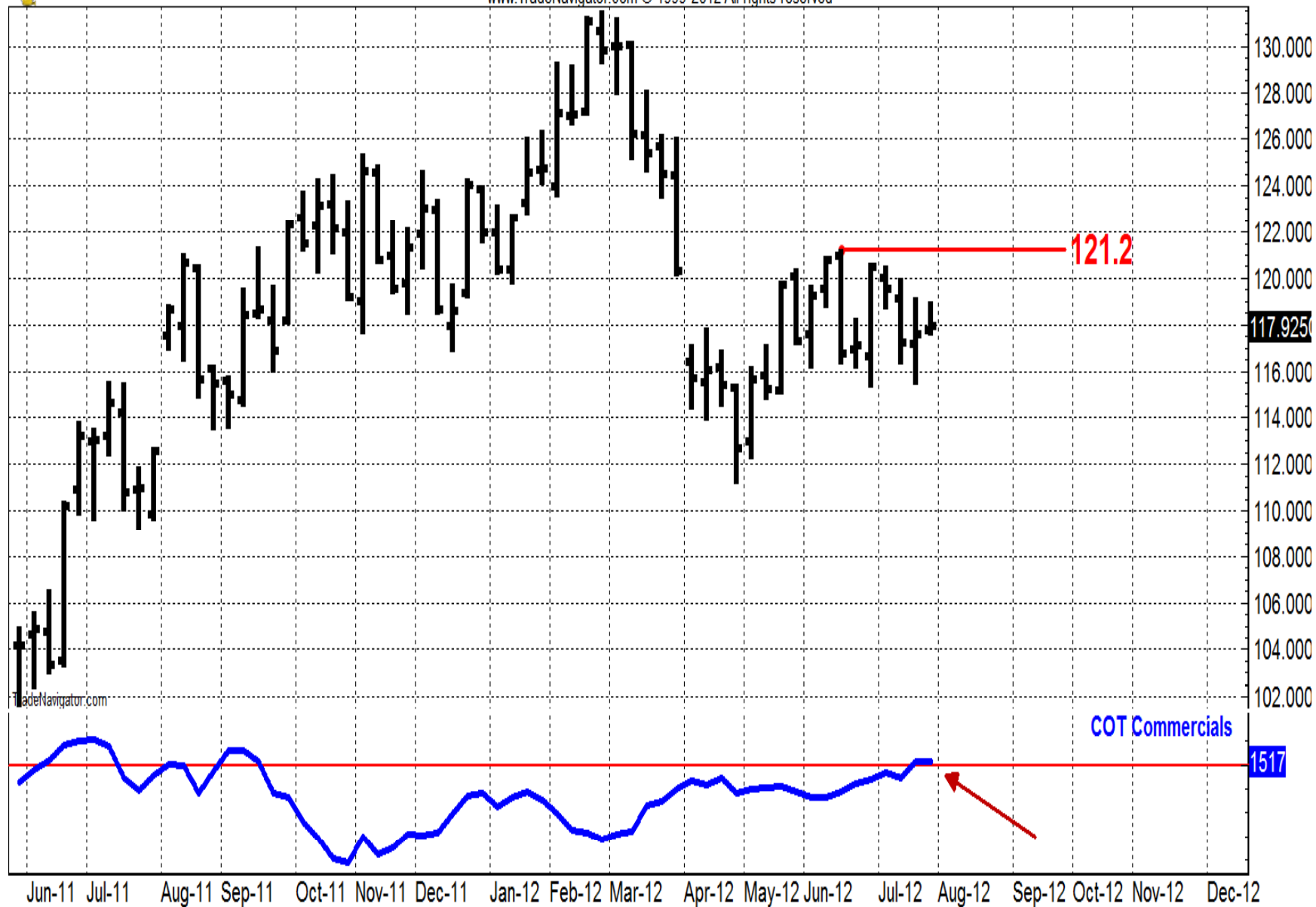
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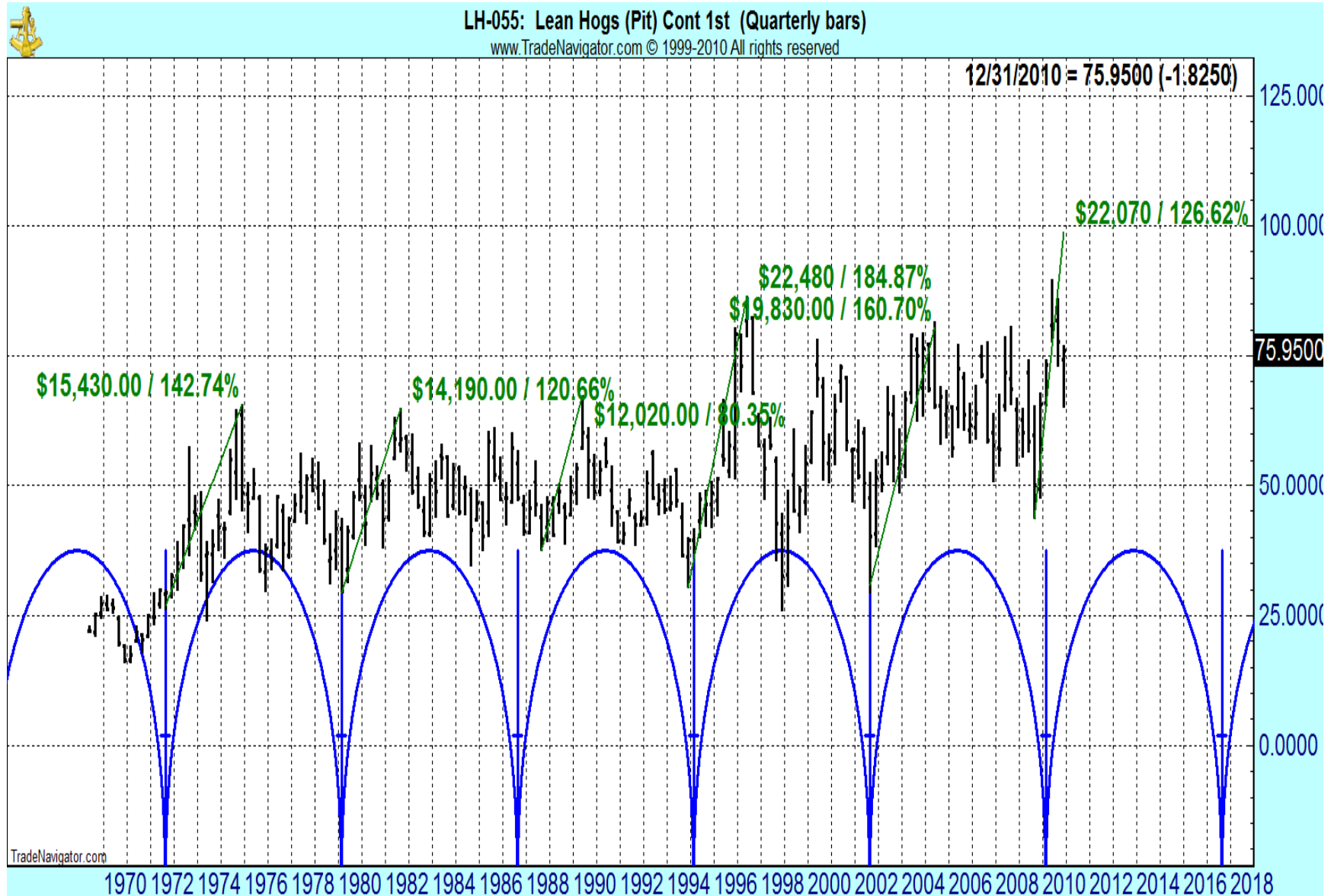


LE-055: Live Cattle (Elec) Cont 1st (Weekly bars)

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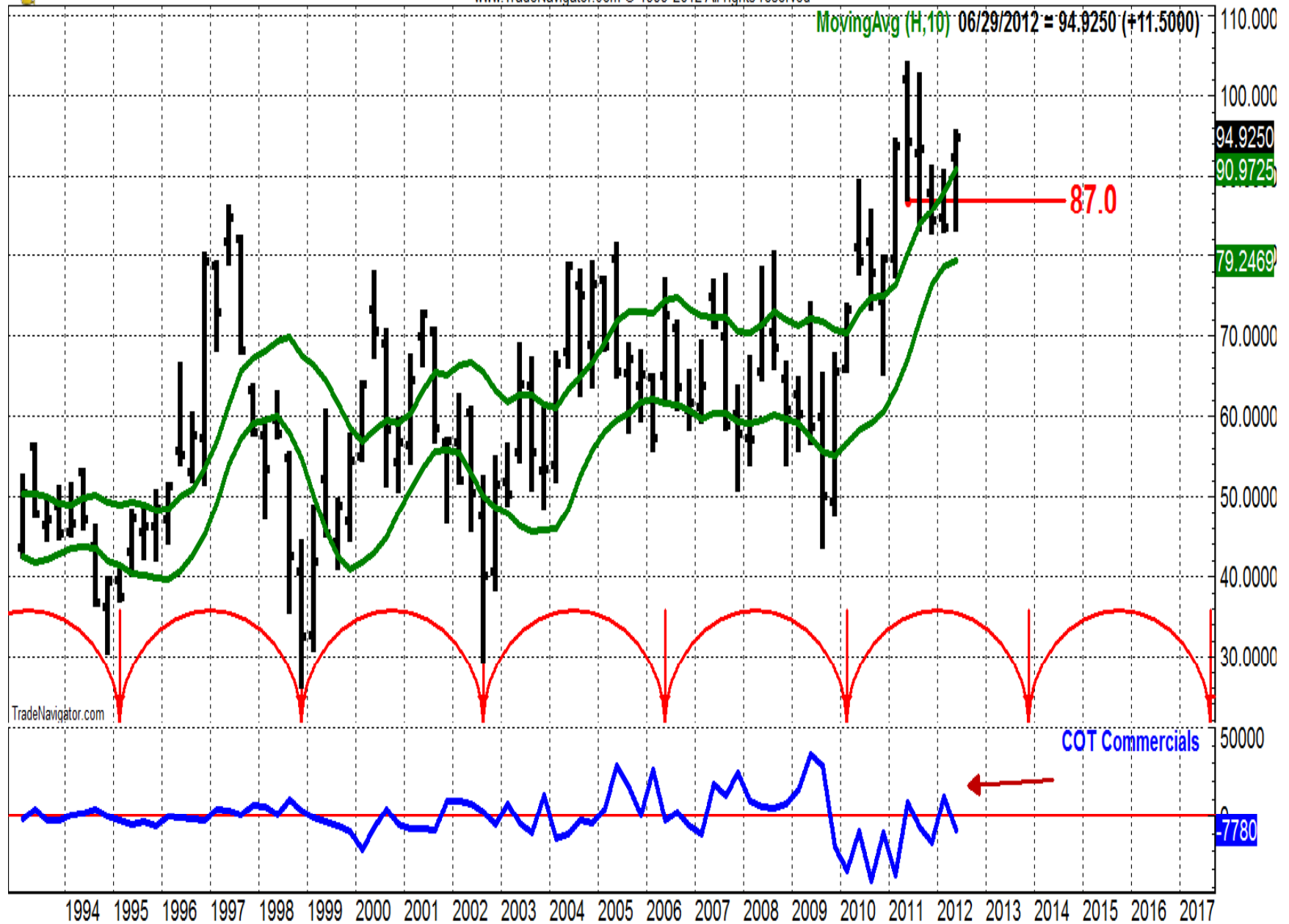
Hog cycles





LH-055: Lean Hogs (Pit) Cont 1st (Quarterly bars)

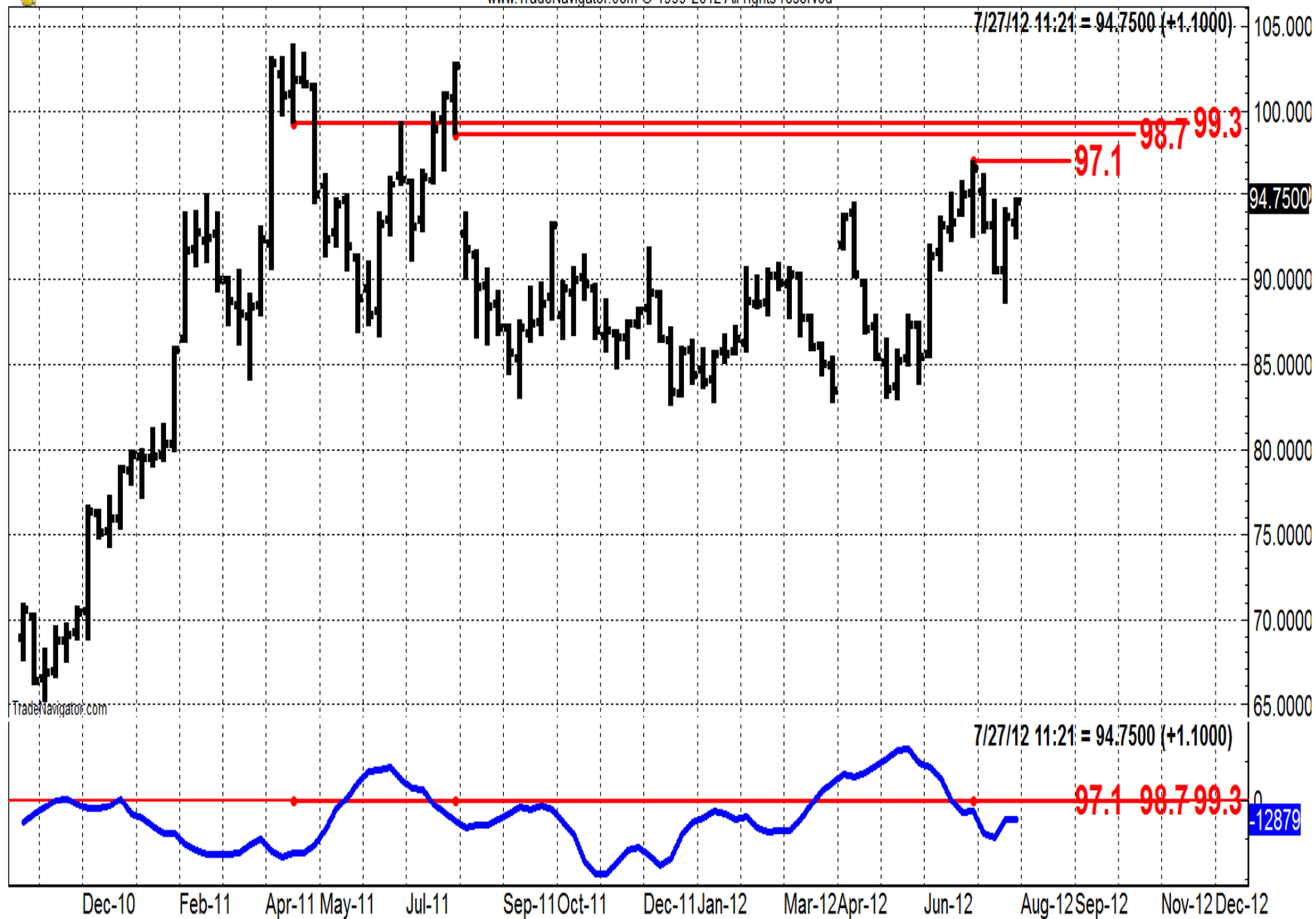
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HE-055: Lean Hogs (Elec) Cont 1st (Weekly bars)

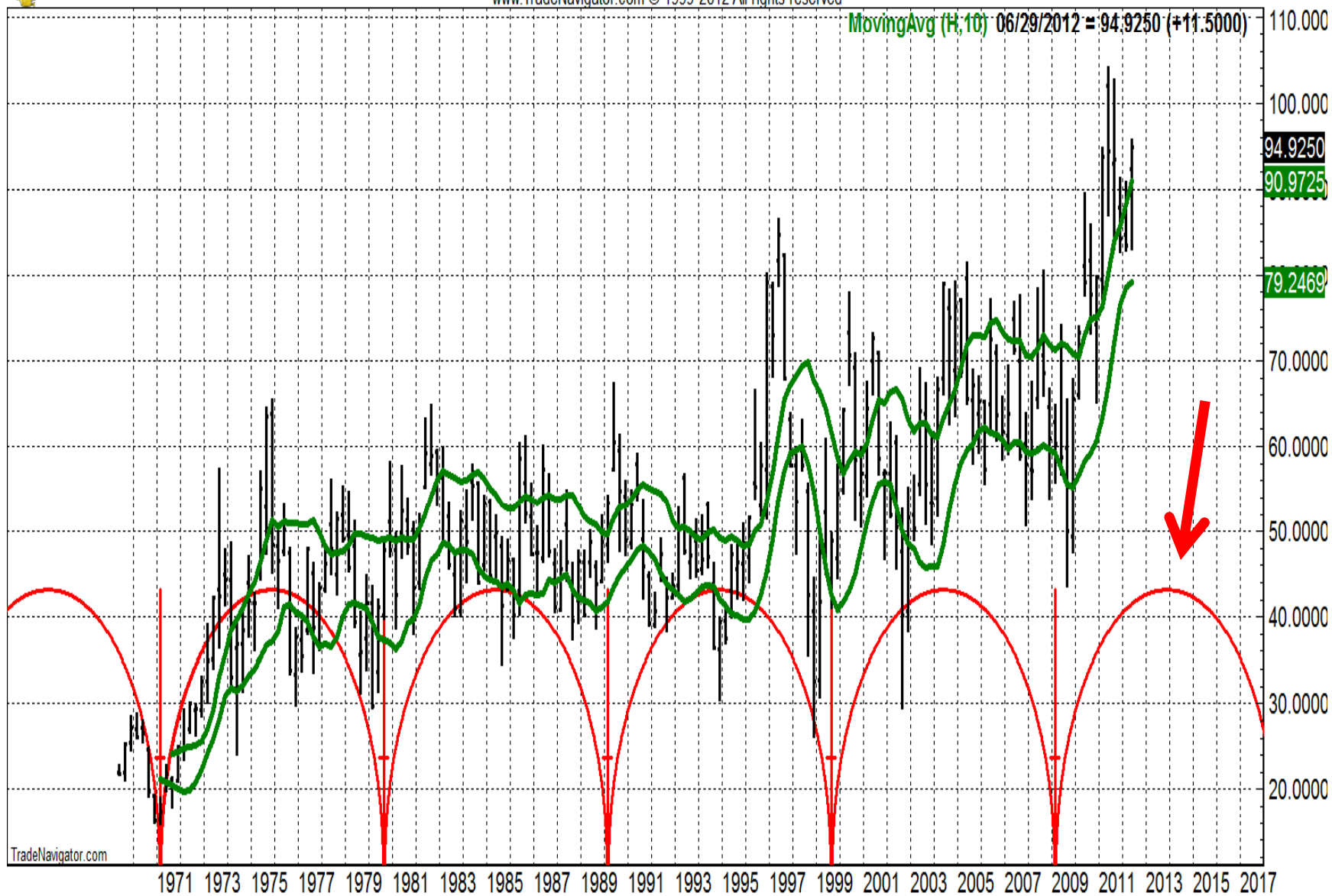
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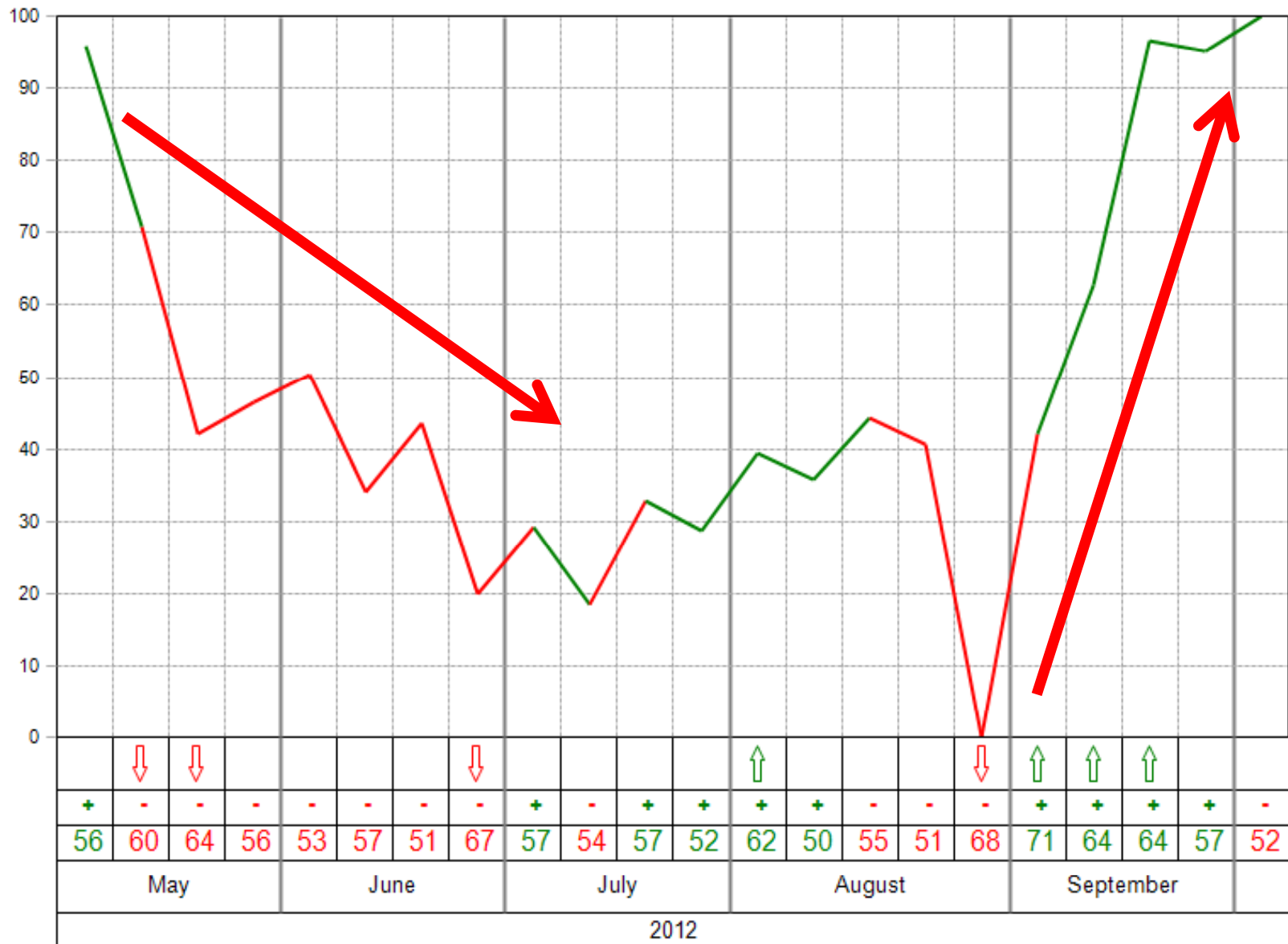


LH-055: Lean Hogs (Pit) Cont 1st (Quarterly bars)

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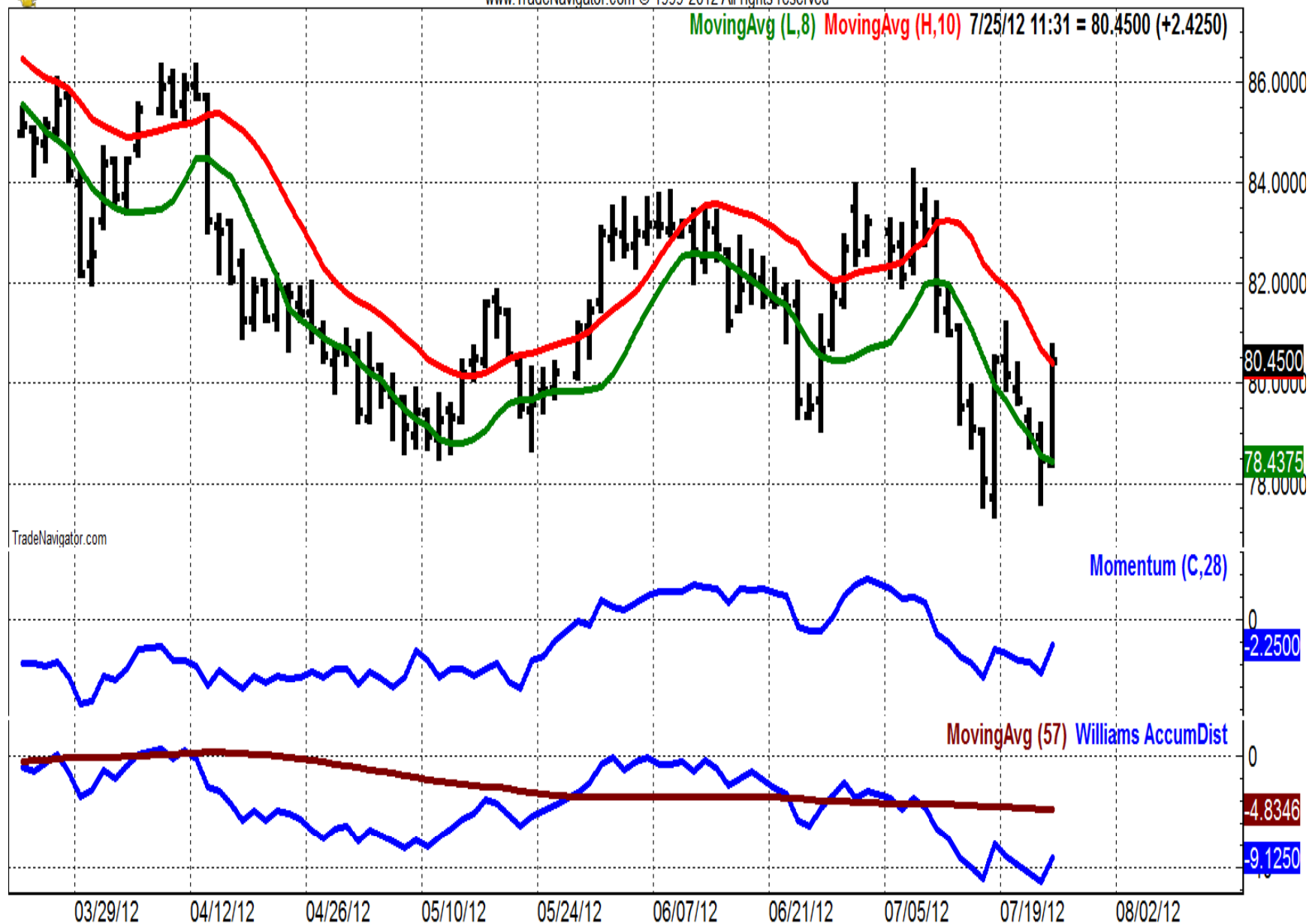
WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : October - Lean Hogs 1970 - 2012





HE-201210: Lean Hogs (Elec) Oct 2012 (Daily bars)

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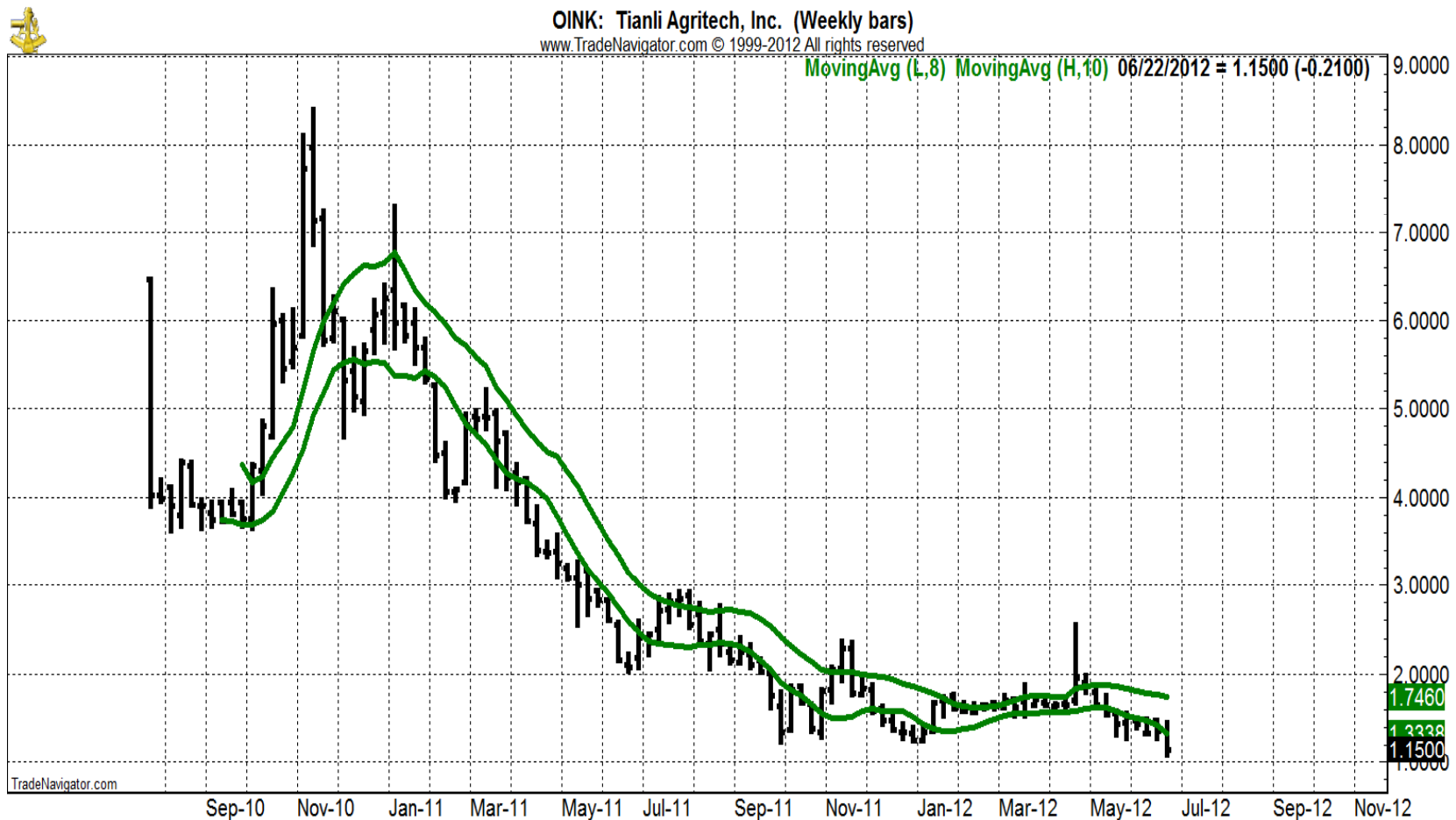


Meats

- COW
- HRL
- SAFM
- TSN
- OINK

<http://finance.yahoo.com/news/tianli-agritech-announces-retail-strategy-120000612.html>

- <http://seekingalpha.com/article/507261-tianli-agritech-a-significantly-undervalued-and-oversold-stock>

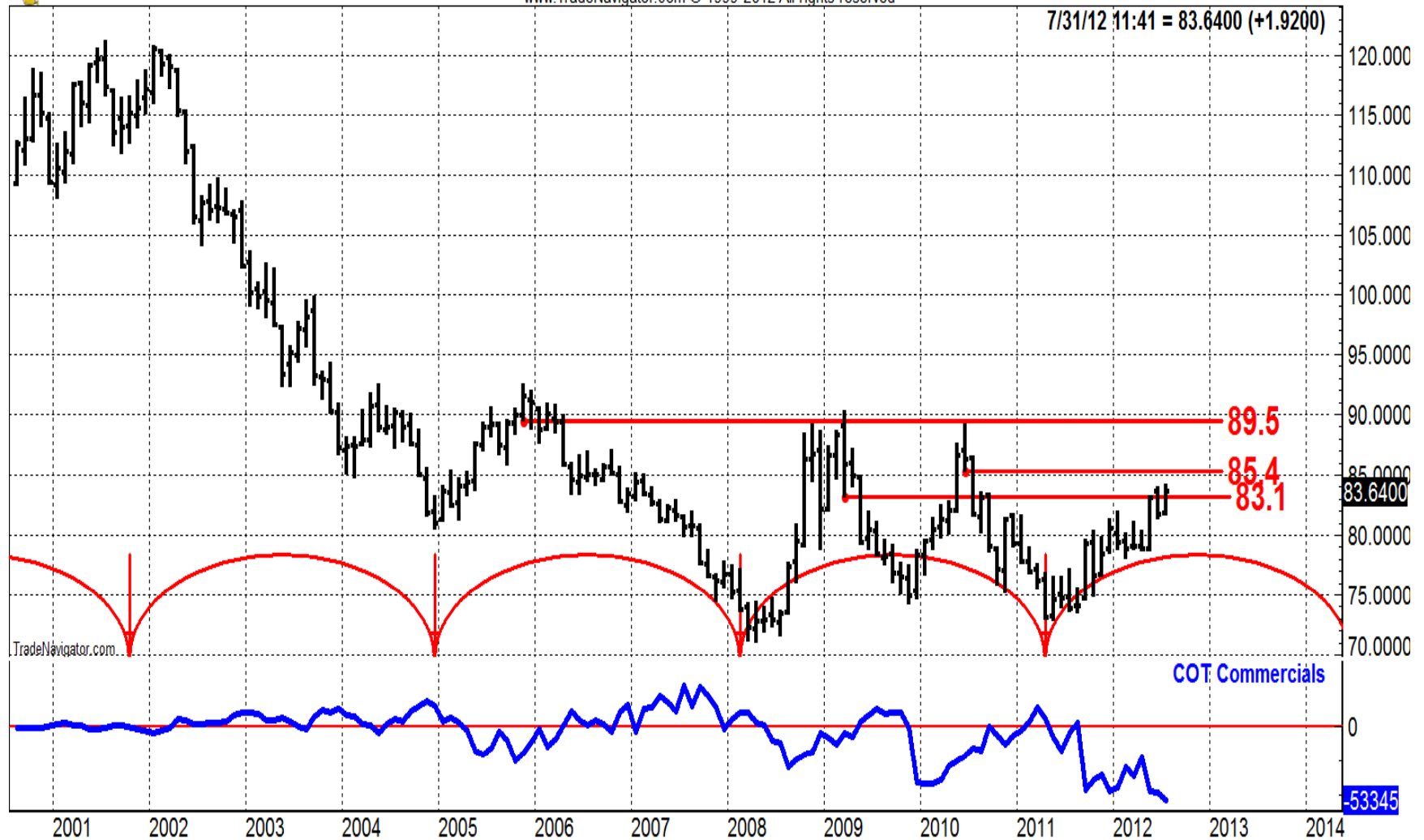


Dollar topping



DX2-055: US Dollar Indx (Comb) Cont 1st (Monthly bars)

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DX2-055: US Dollar Indx (Comb) Cont 1st (Monthly bars)

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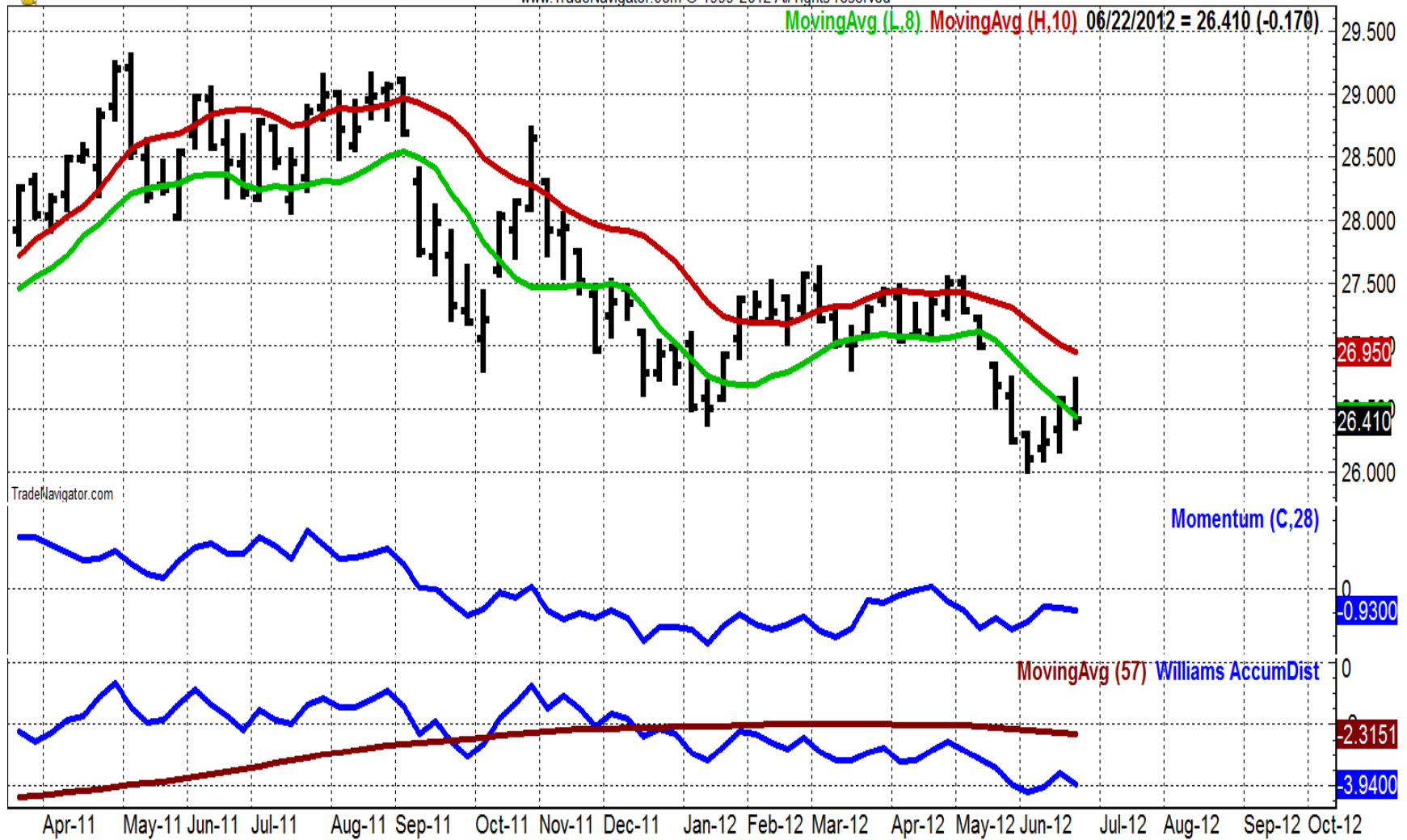


UDN



UDN: PowerShares DB US Dollar Index (Weekly bars)

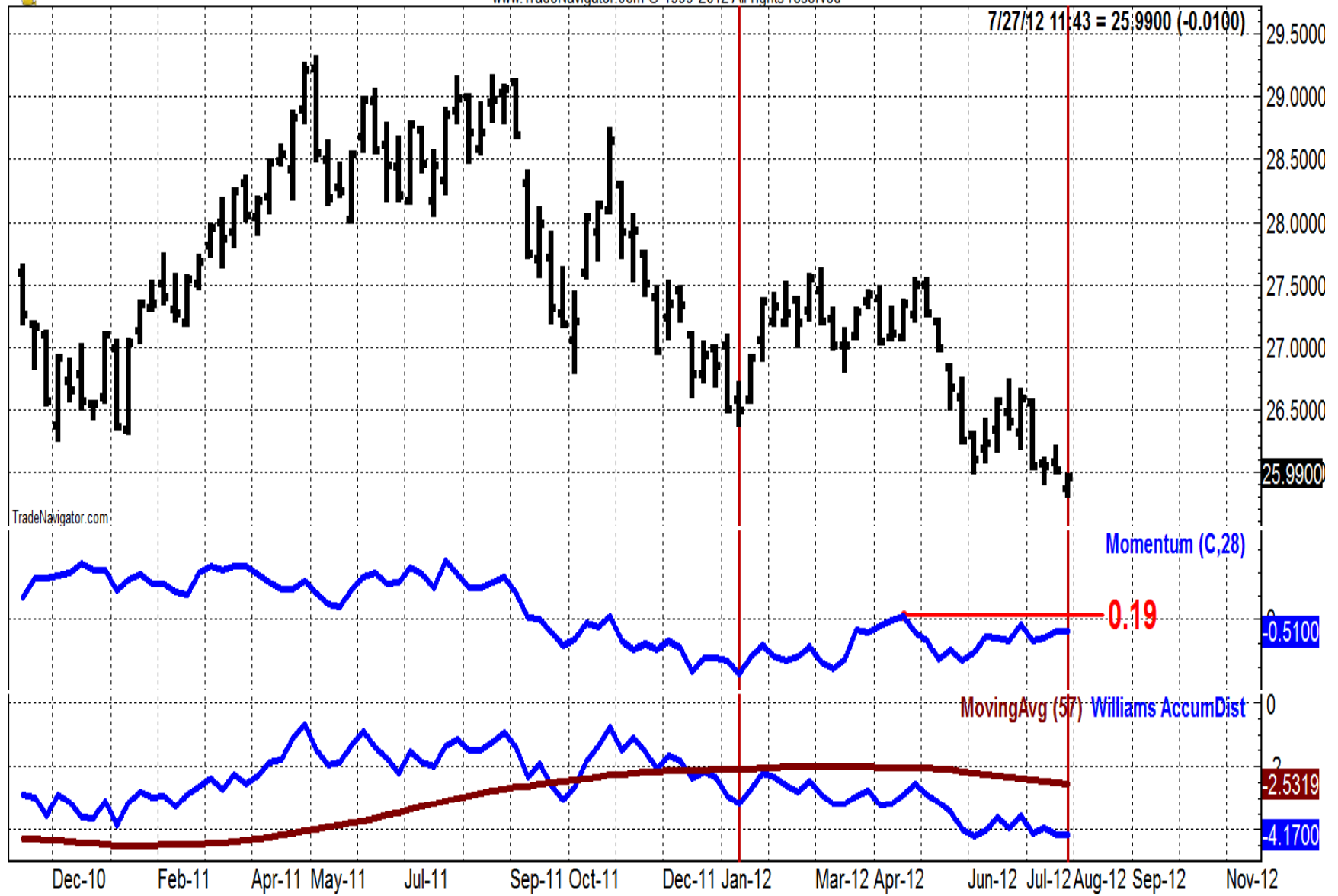
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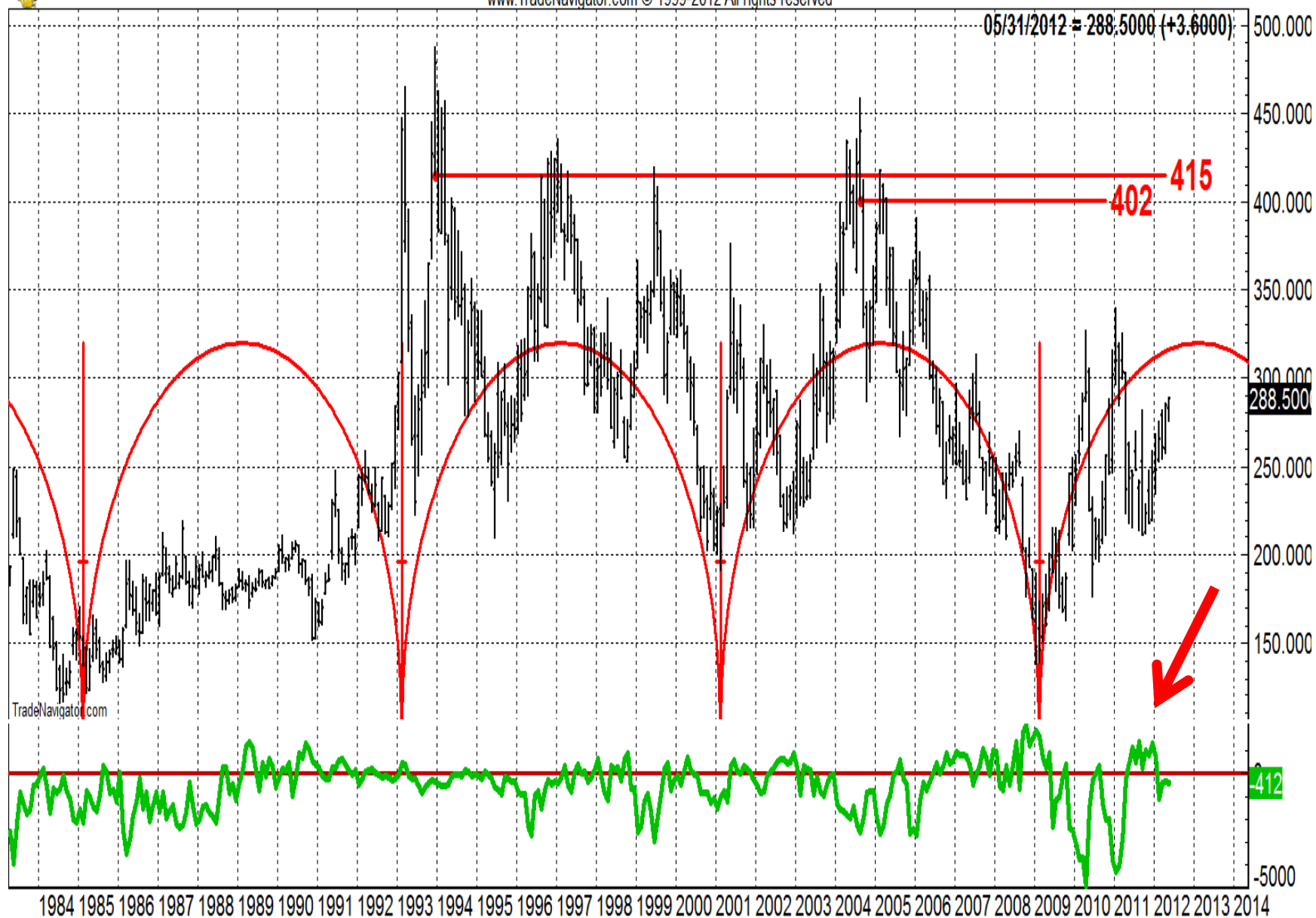
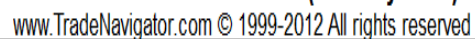




UDN: PowerShares DB US Dollar Index (Weekly bars)

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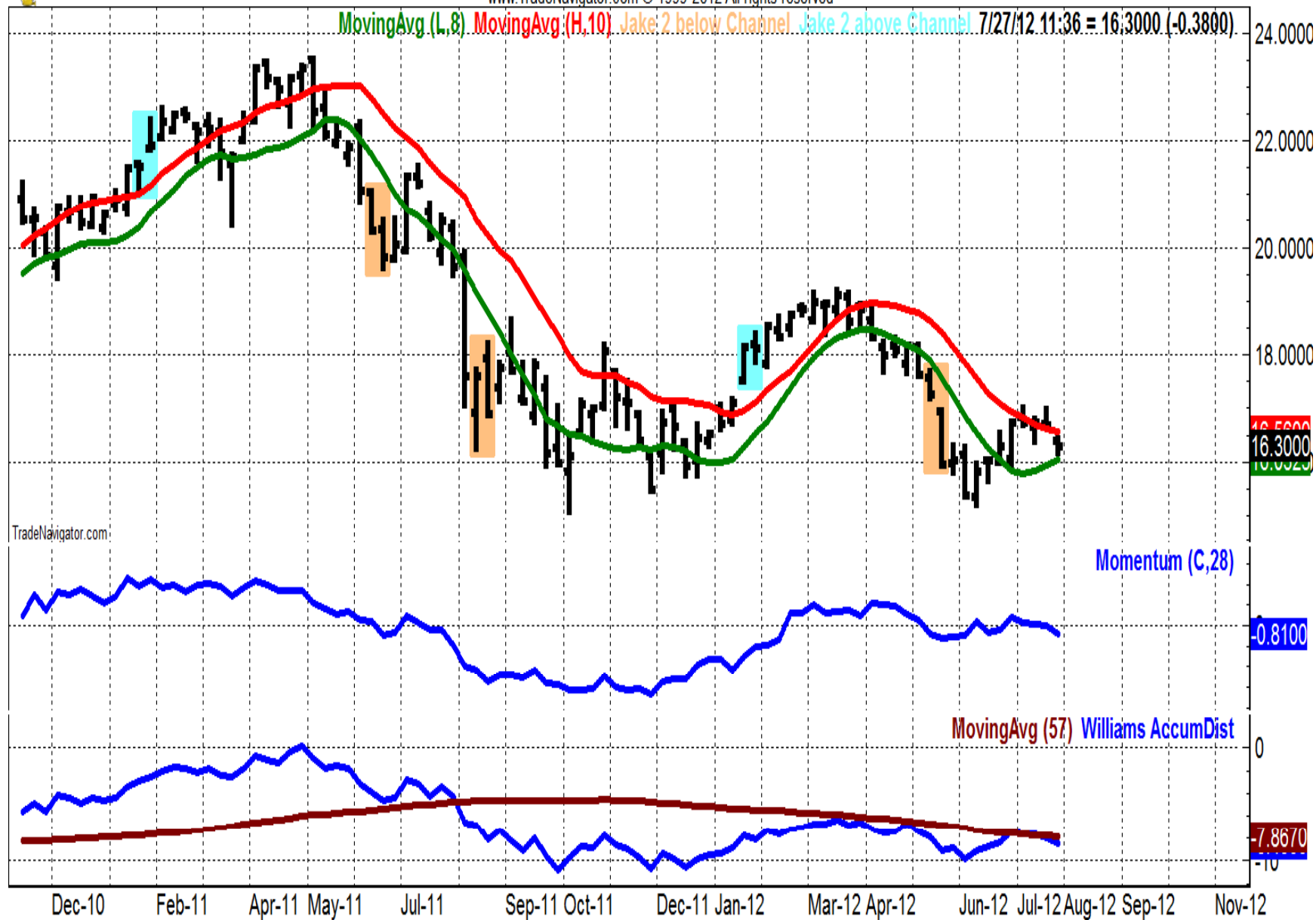






CUT: Guggenheim Timber ETF (Weekly bars)

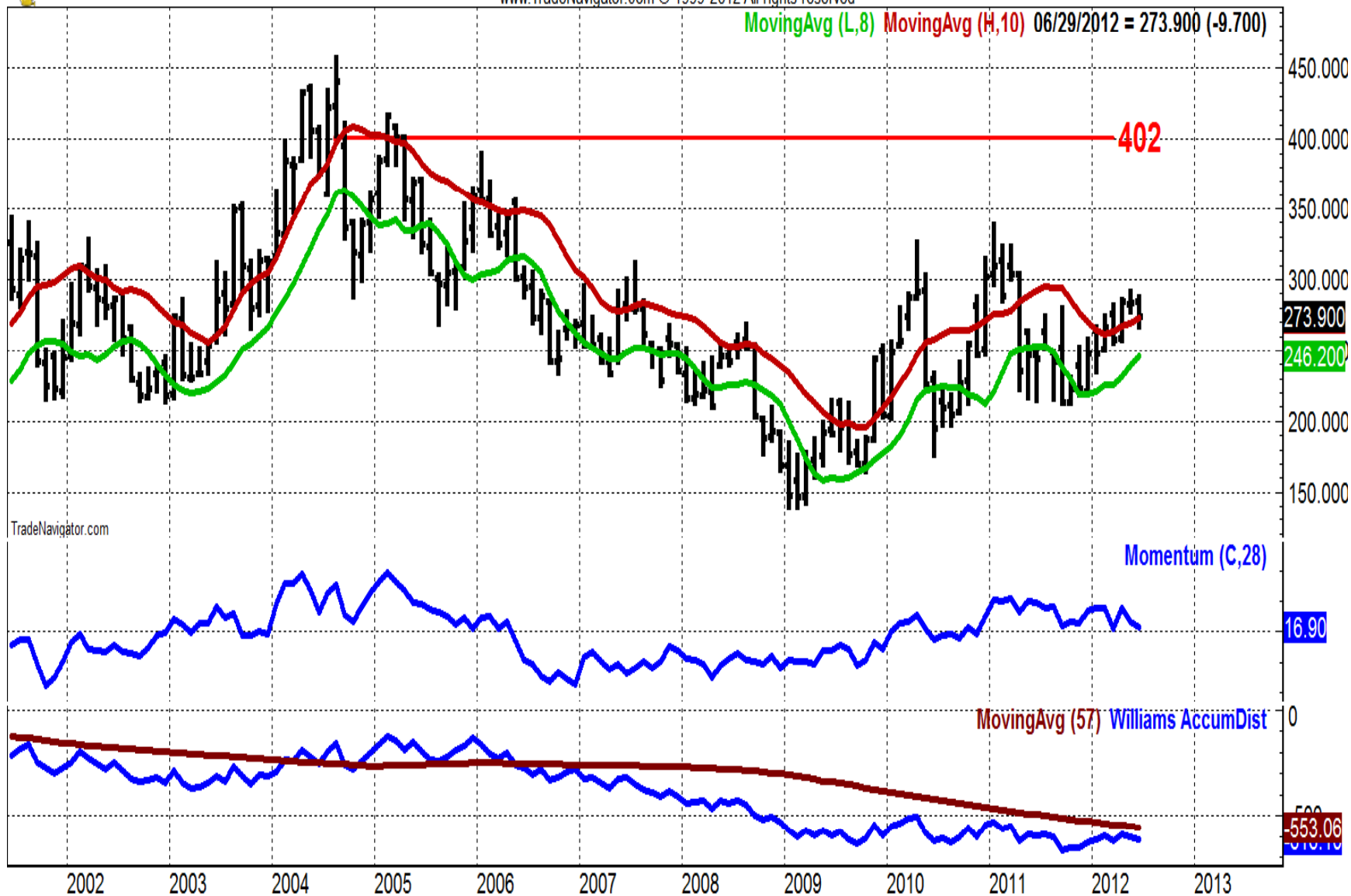
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LB3-055: Lumber (Elec) Cont 1st (Monthly bars)

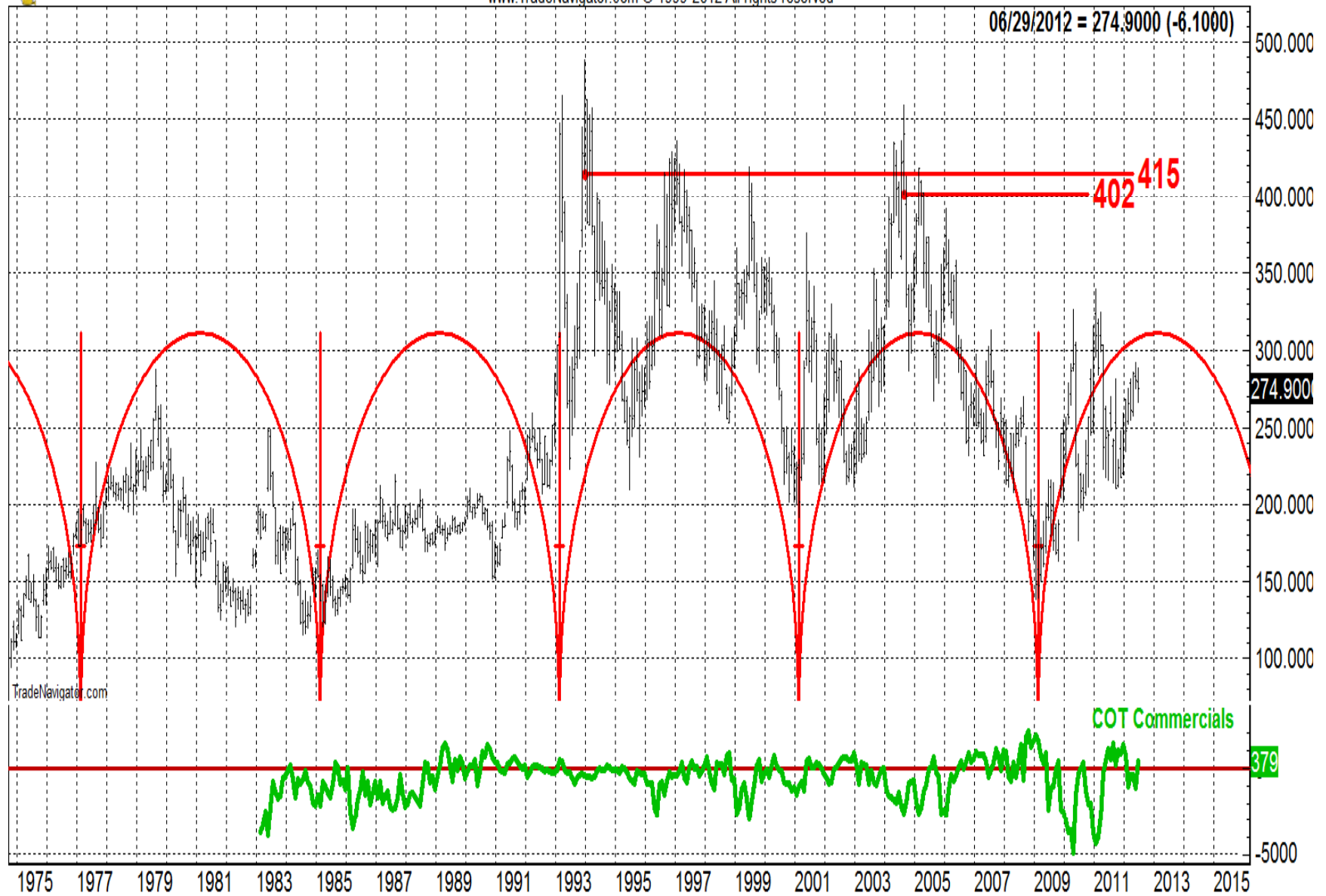
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LB-055: Lumber Cont 1st (Monthly bars)

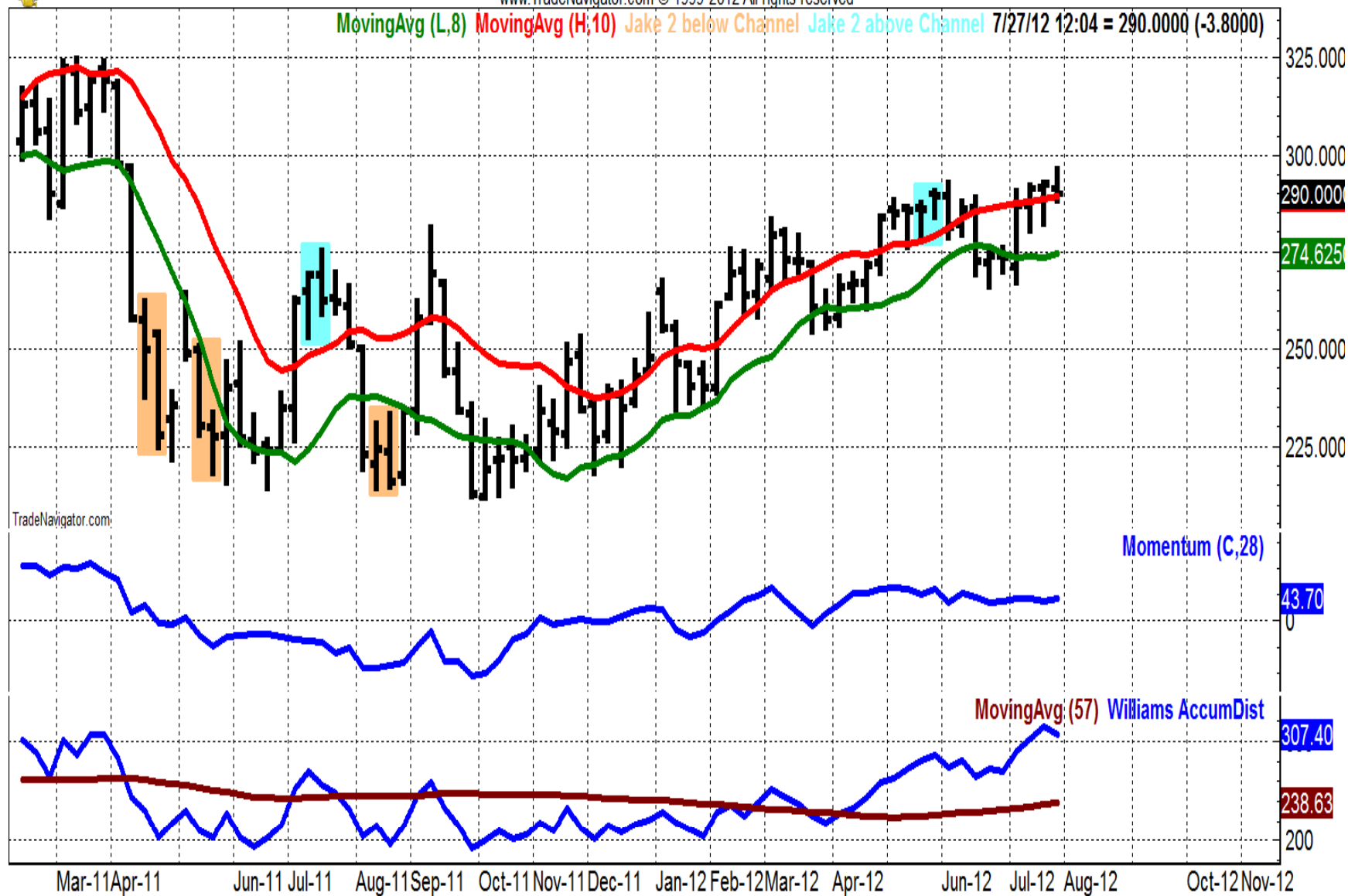
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LB3-055: Lumber (Elec) Cont 1st (Weekly bars)

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Trades for lumber

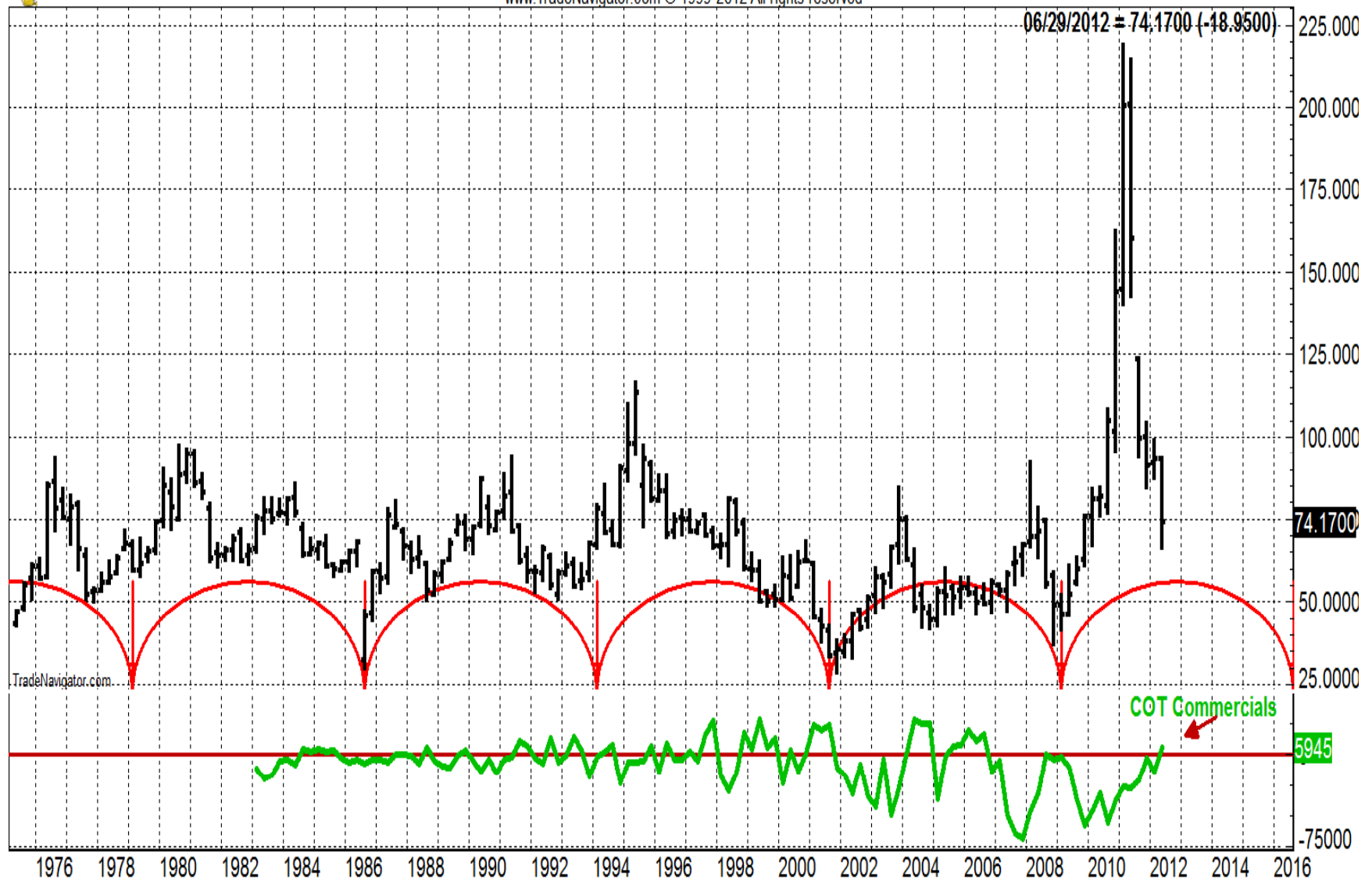
△ Symbol	Description
CRT	Cross Timbers Royalty Trust
CUT	Guggenheim Timber ETF
DEL	Deltic Timber Corporation
PCL	Plum Creek Timber Company, Inc
TBL	Timberland Company (The)
TLR	Timberline Resources Corporati
TSBK	Timberland Bancorp, Inc.
WOOD	iShares S&P Global Timber & Fo

Cotton



CT-055: Cotton #2 (Elec) Cont 1st (Quarterly bars)

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BAL: iPath DJ-UBS Cotton ETN (Weekly bars)

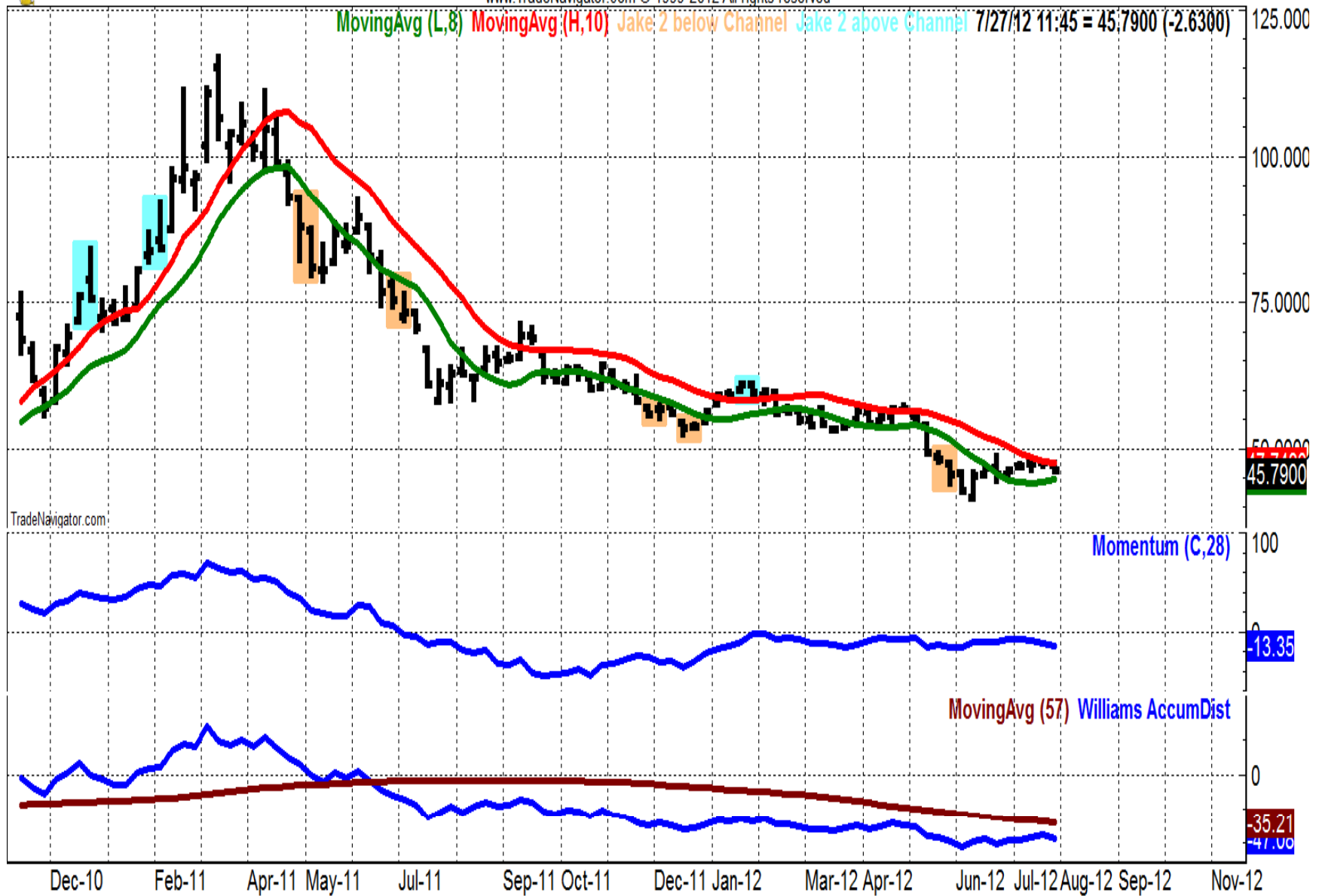
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BAL: iPath DJ-UBS Cotton ETN (Weekly bars)

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SB-055: Sugar #11 (Elec) Cont 1st (Monthly bars)

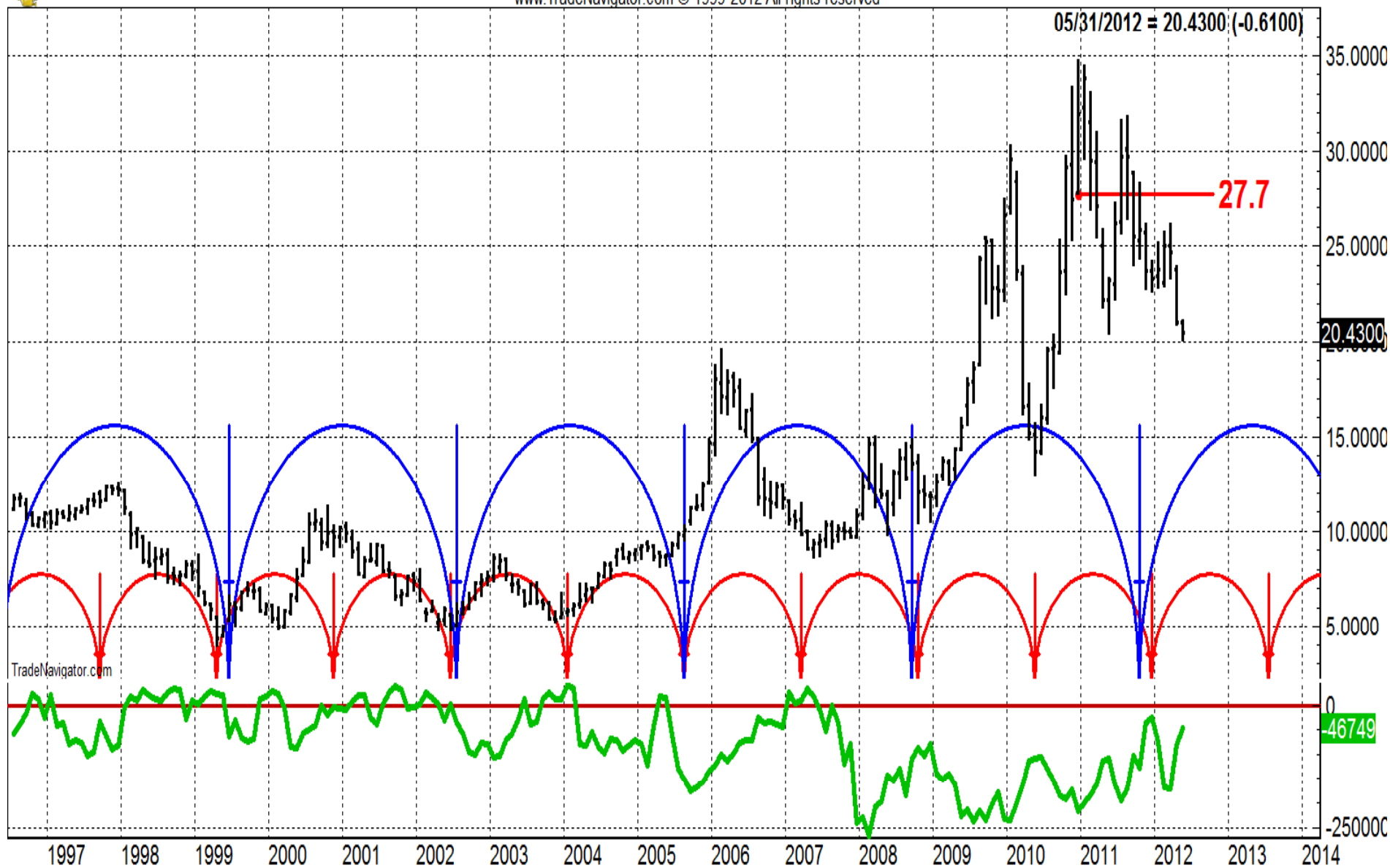
www.TradeNavigator.com © 1999-2011 All rights reserved





SB2-055: Sugar #11 (Comb) Cont 1st (Monthly bars)

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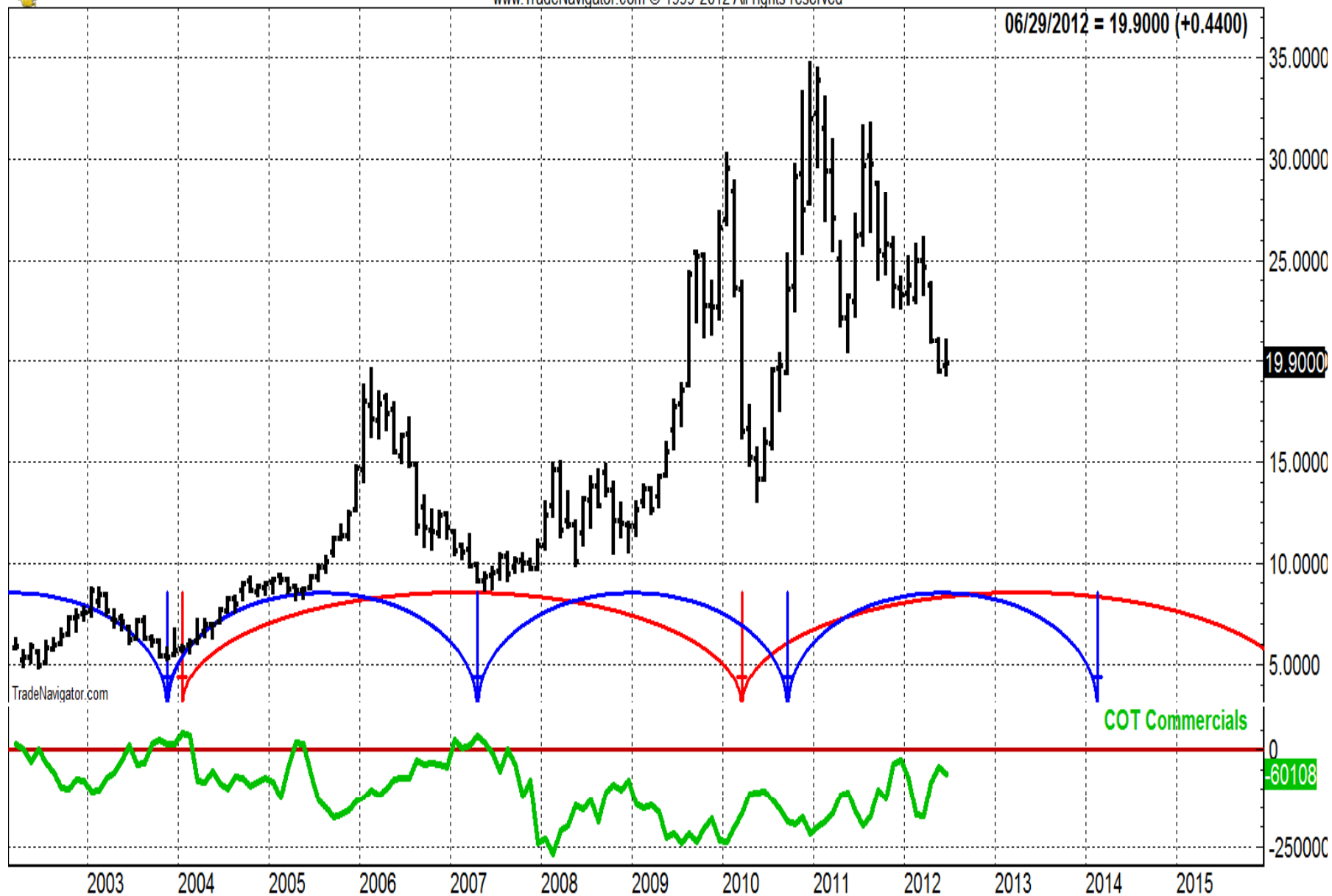




SB-055: Sugar #11 (Elec) Cont 1st (Monthly bars)

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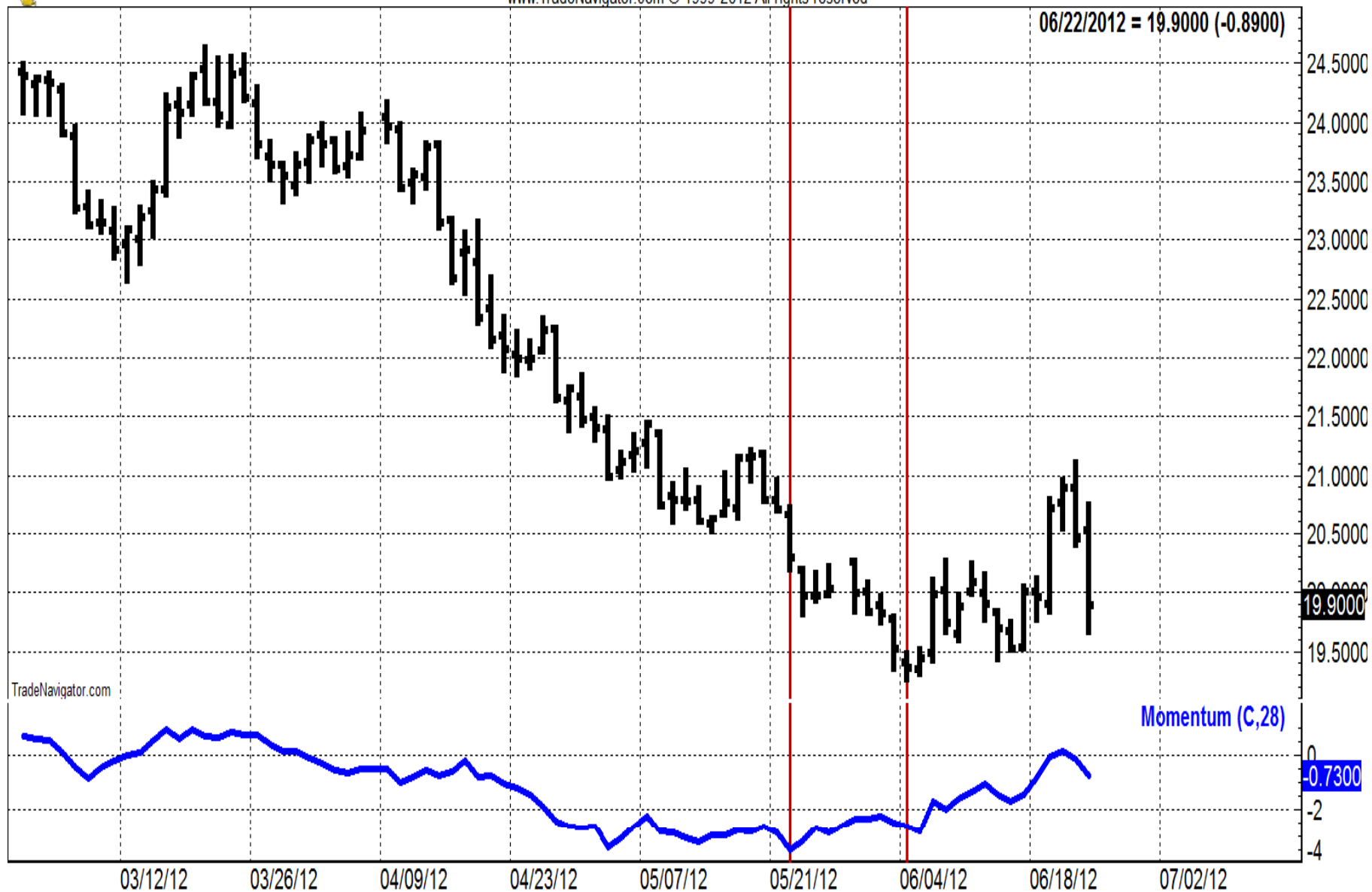
06/29/2012 = 19.9000 (+0.4400)





SB2-201210: Sugar #11 (Comb) Oct 2012 (Daily bars)

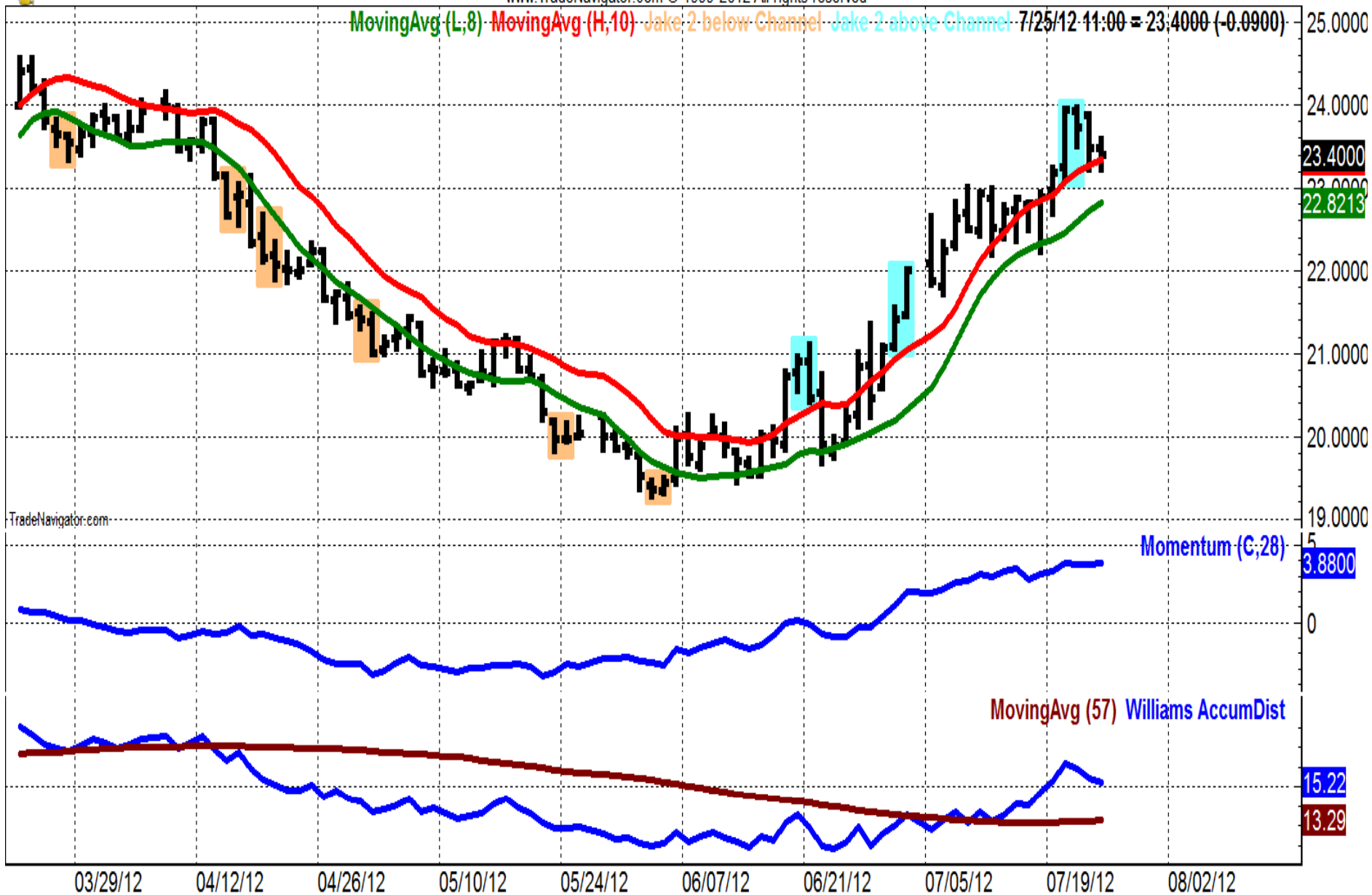
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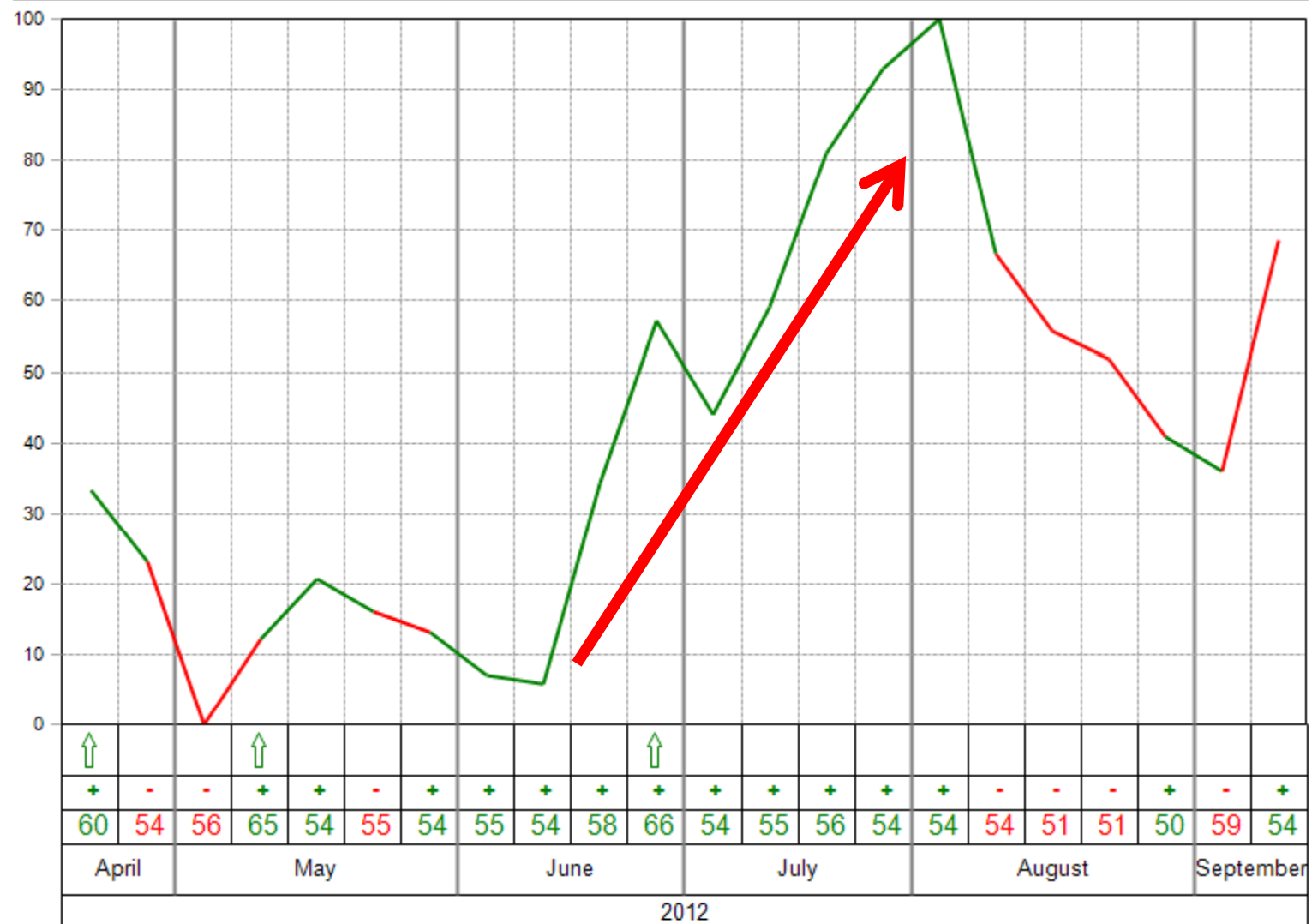


SB2-201210: Sugar #11 (Comb) Oct 2012 (Daily bars)

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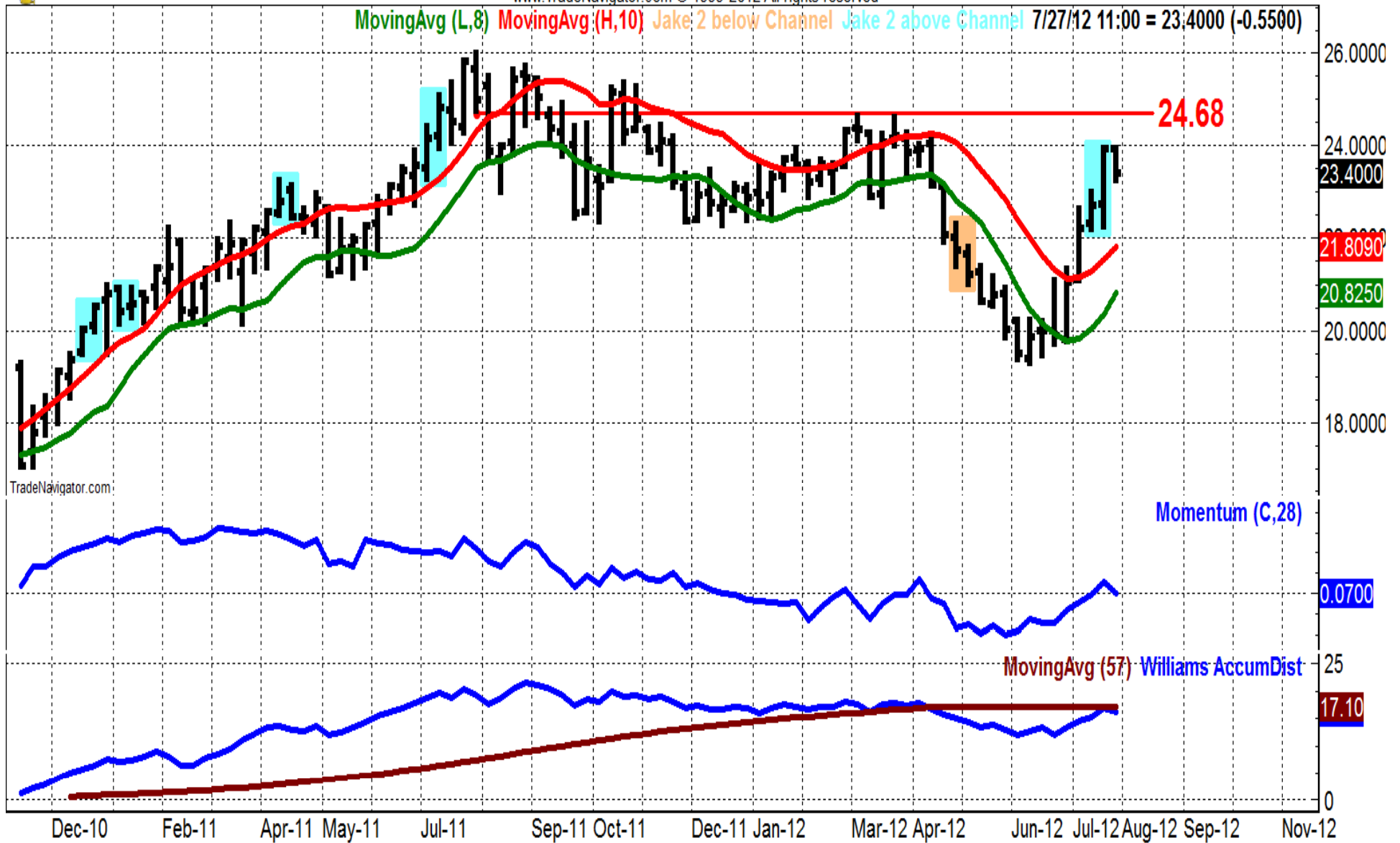
WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : October - Sugar 1973 - 2012





SB2-201210: Sugar #11 (Comb) Oct 2012 (Weekly bars)

www.TradeNavigator.com © 1999-2012 All rights reserved

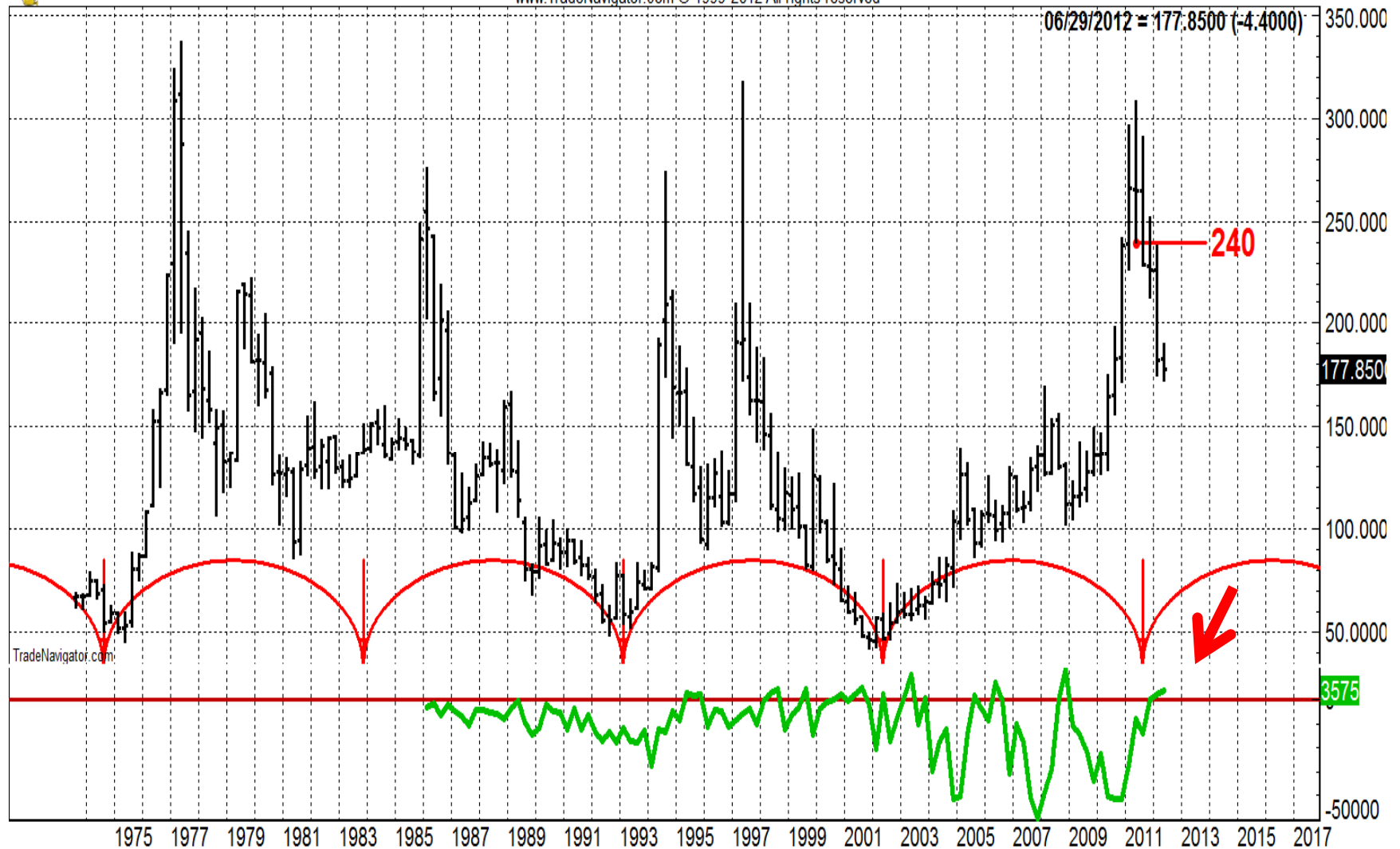


Coffee



KC-055: Coffee (Elec) Cont 1st (Quarterly bars)

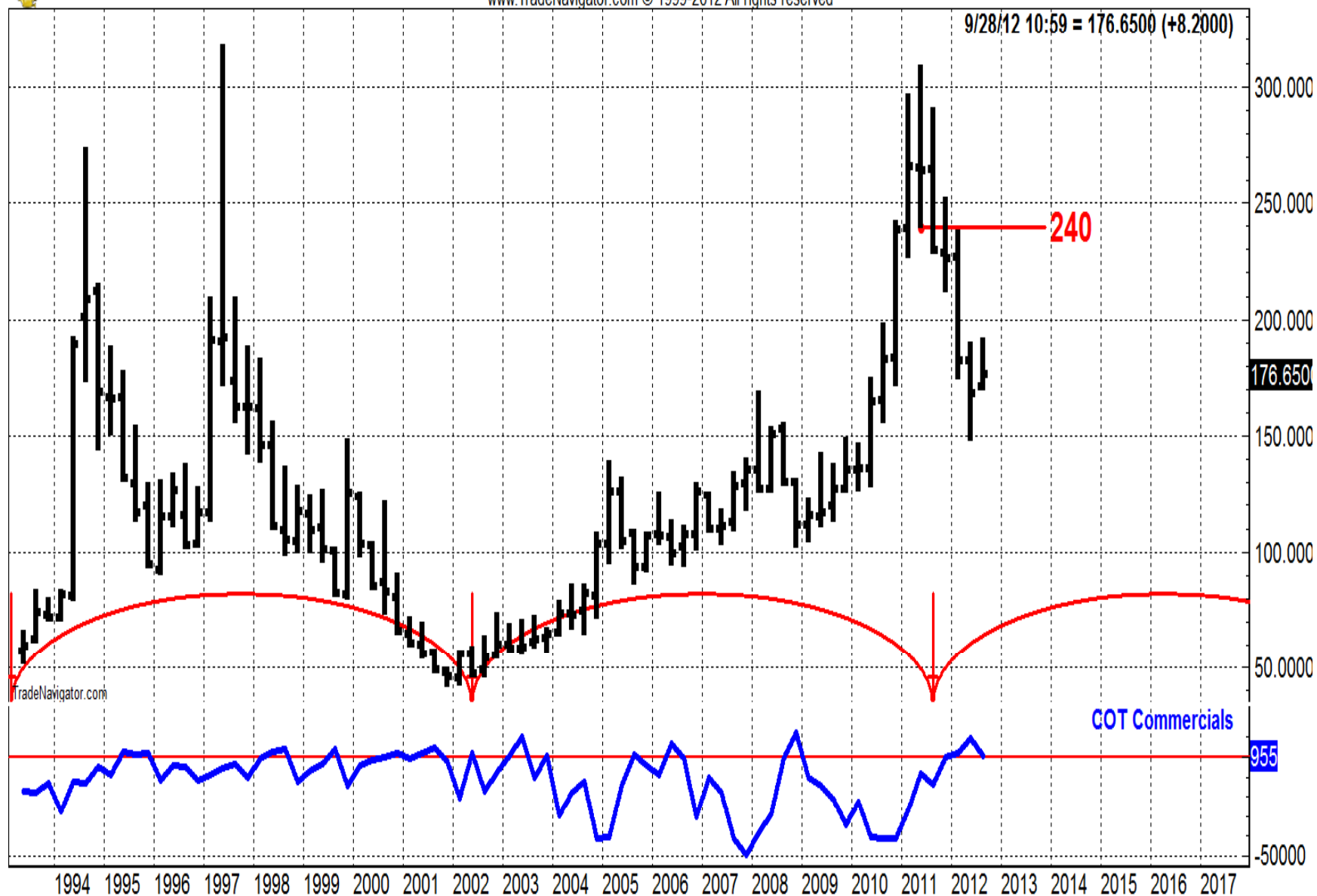
www.TradeNavigator.com © 1999-2012 All rights reserved



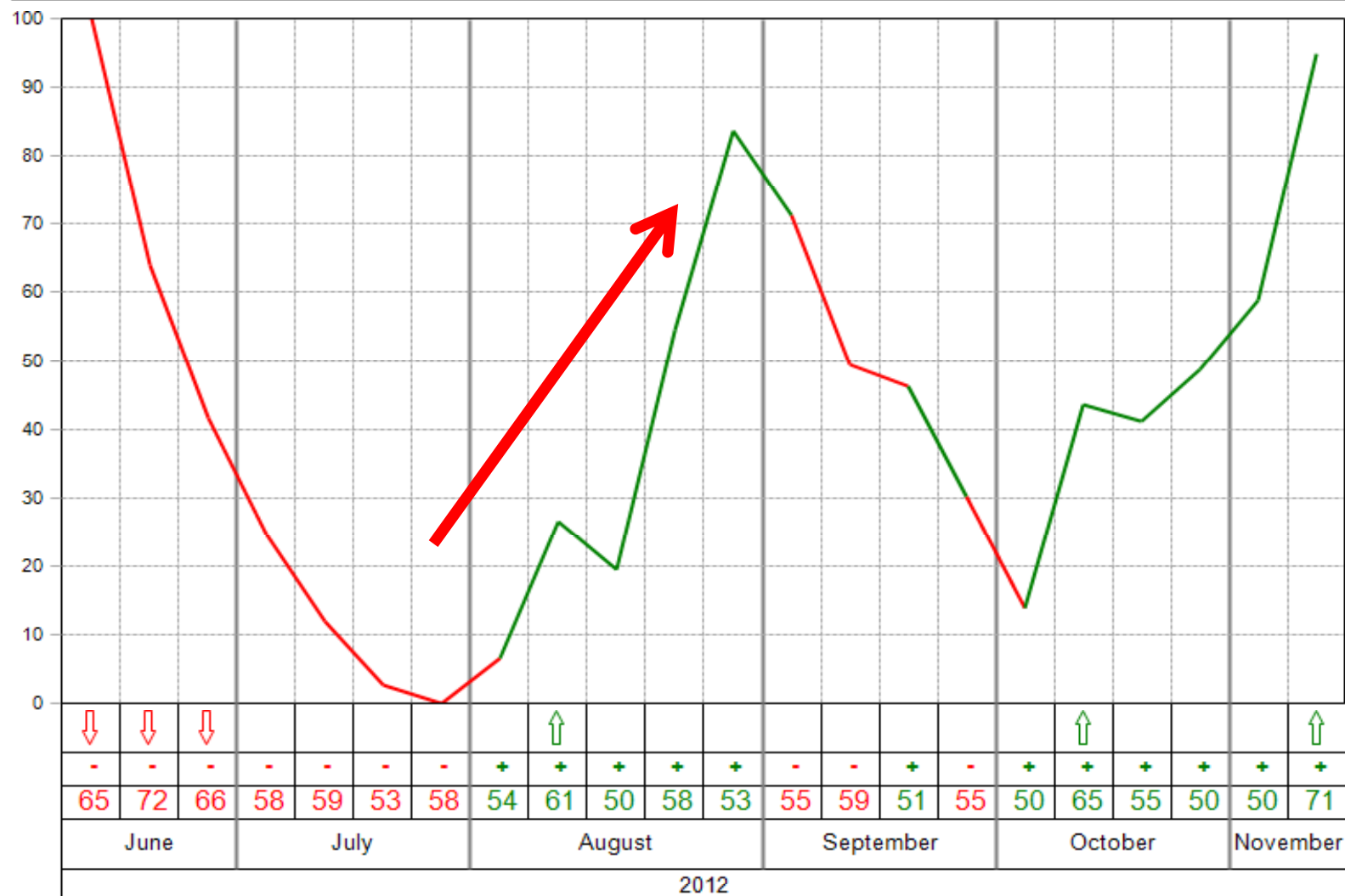


KC-055: Coffee (Elec) Cont 1st (Quarterly bars)

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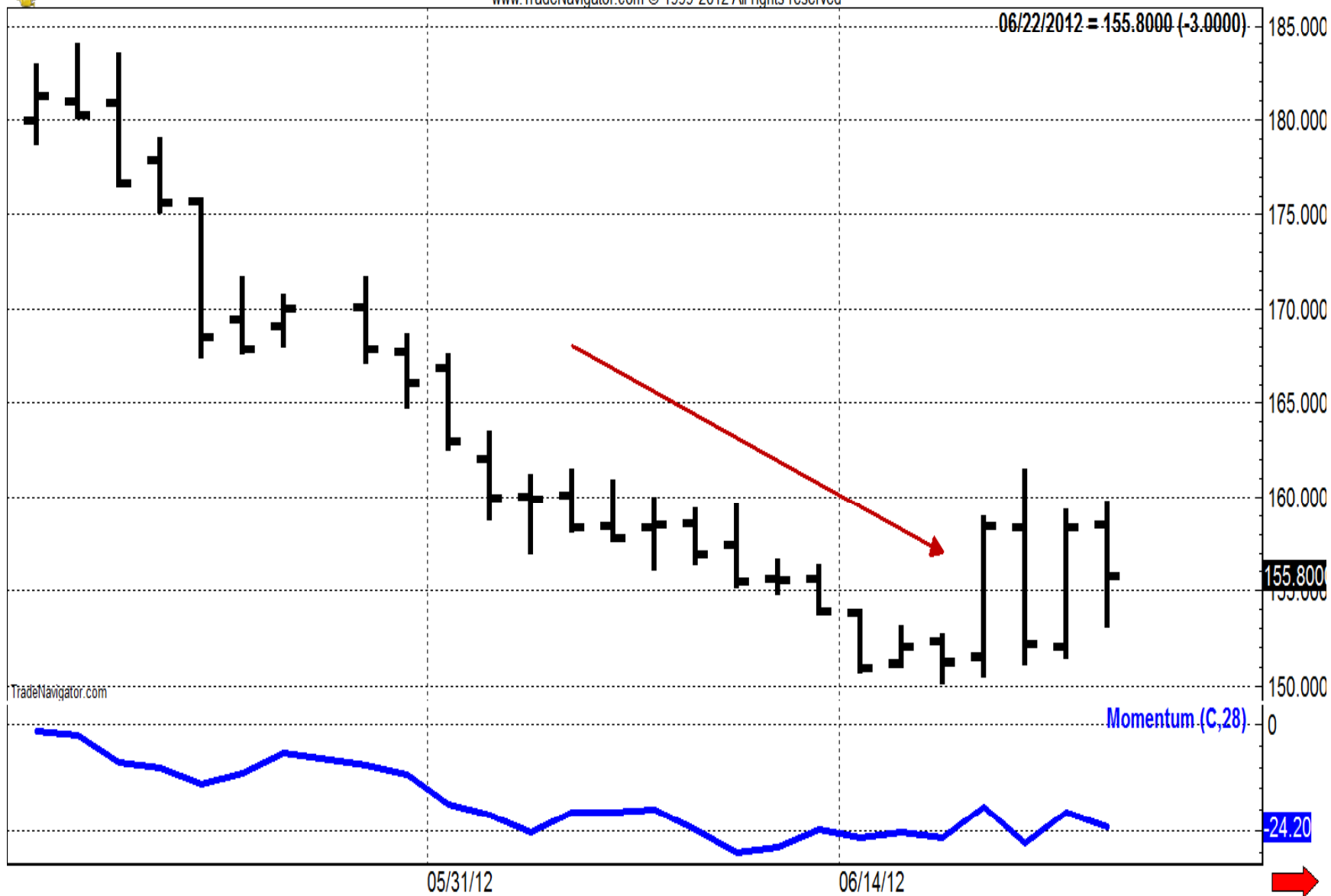
WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - Coffee 1974 - 2012





KC2-201209: Coffee (Comb) Sep 2012 (Daily bars)

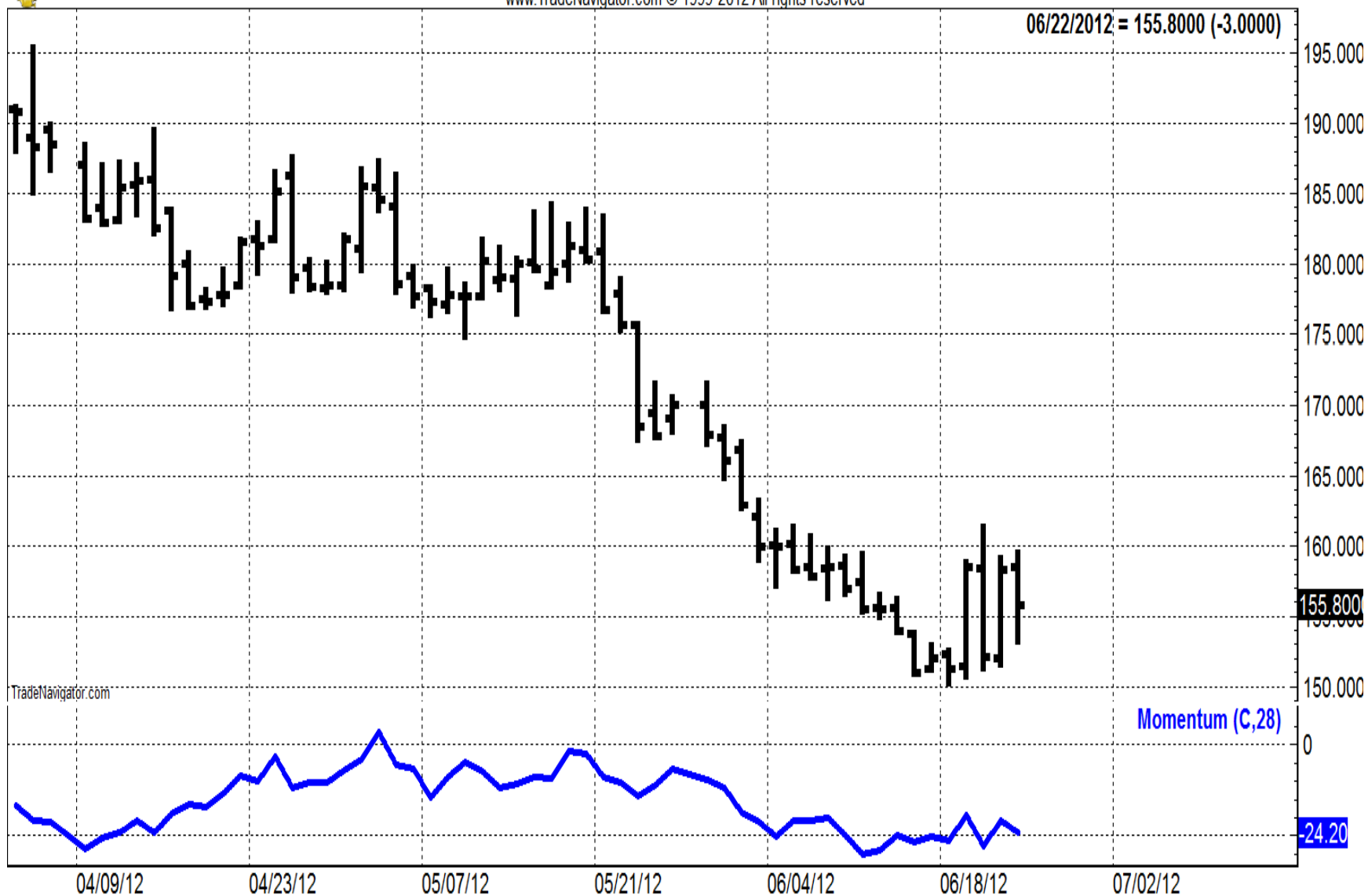
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KC2-201209: Coffee (Comb) Sep 2012 (Daily bars)

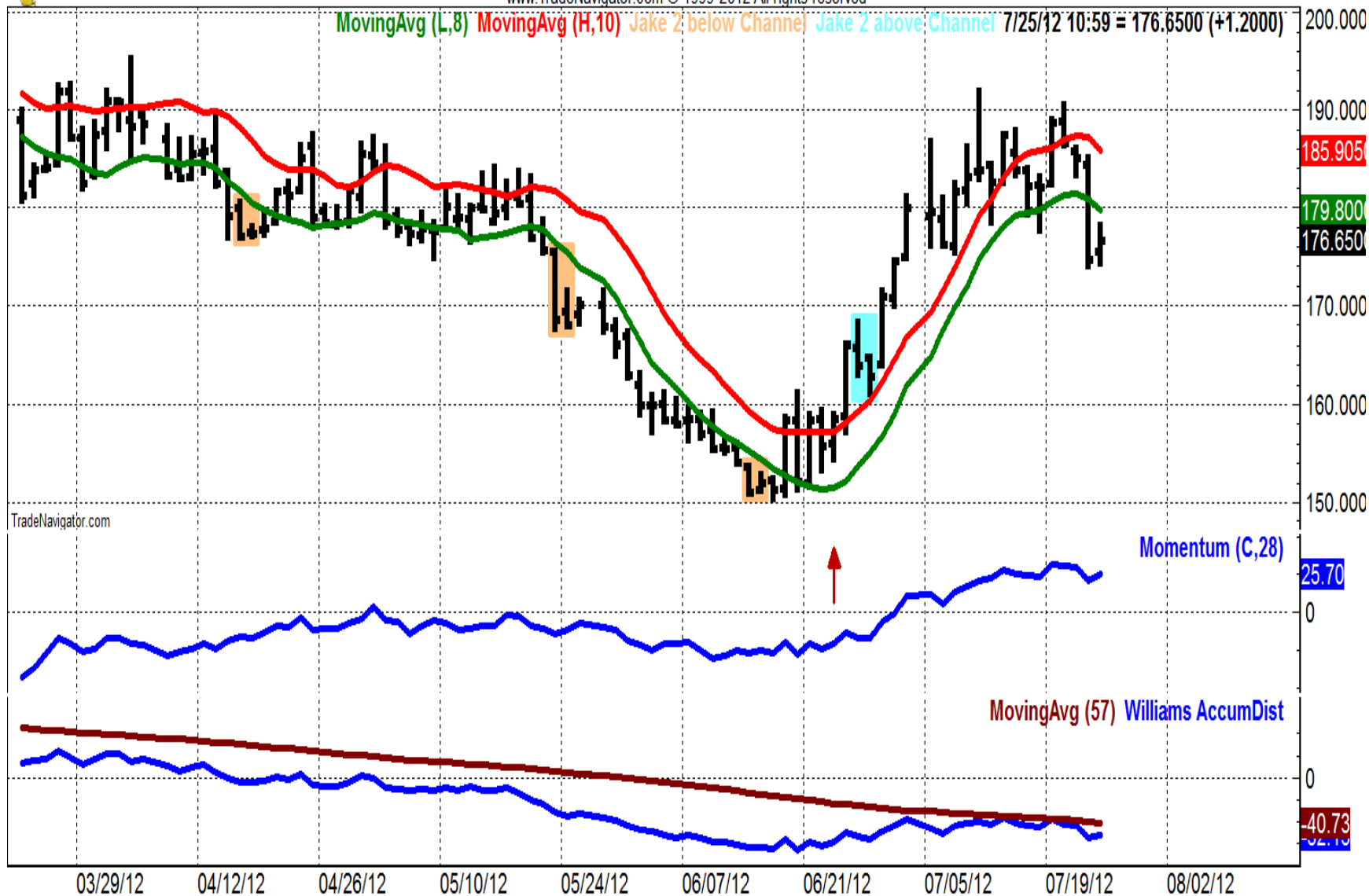
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KC2-201209: Coffee (Comb) Sep 2012 (Daily bars)

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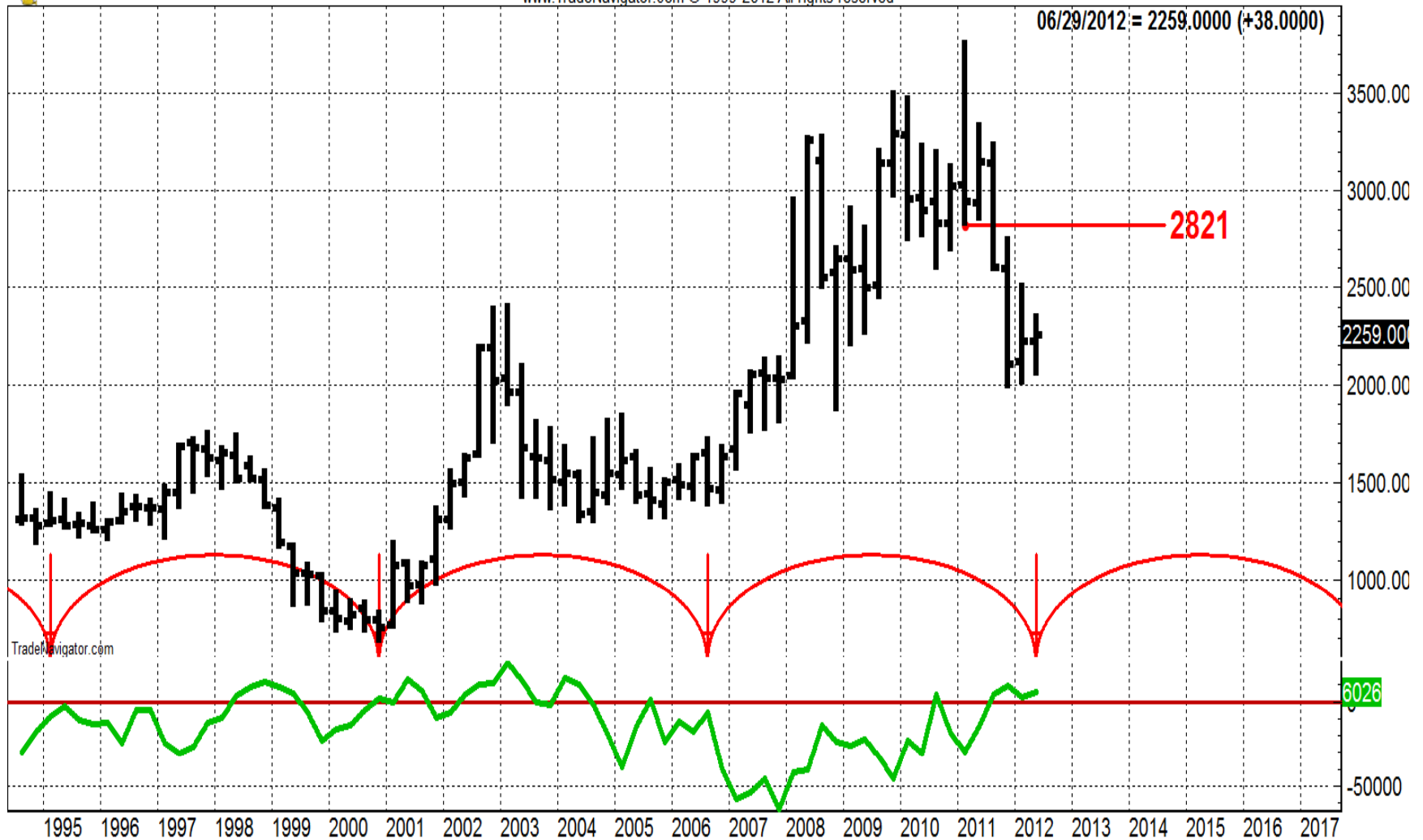


Cocoa – get ready!



CC-055: Cocoa NYBT (Elec) Cont 1st (Quarterly bars)

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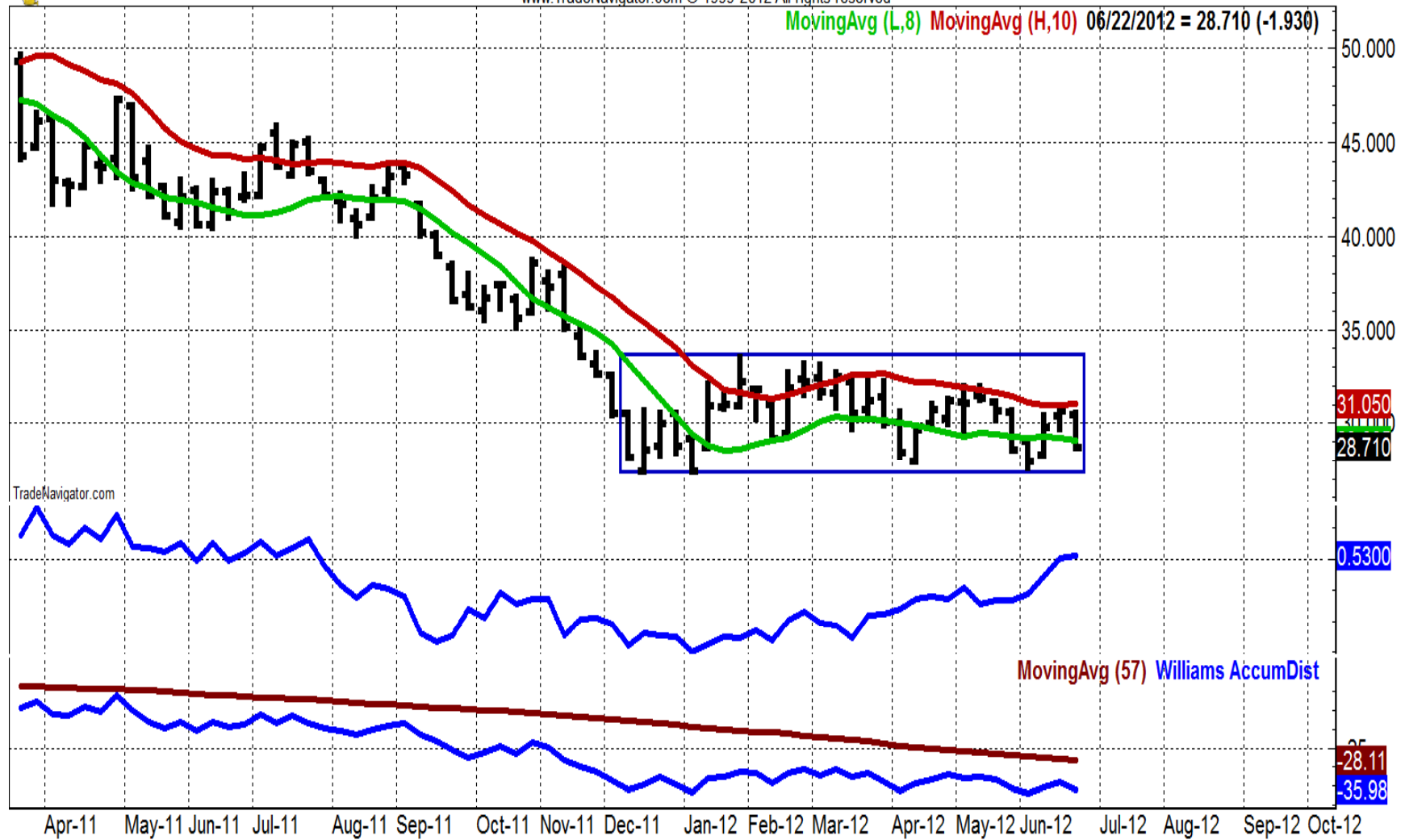


NIB

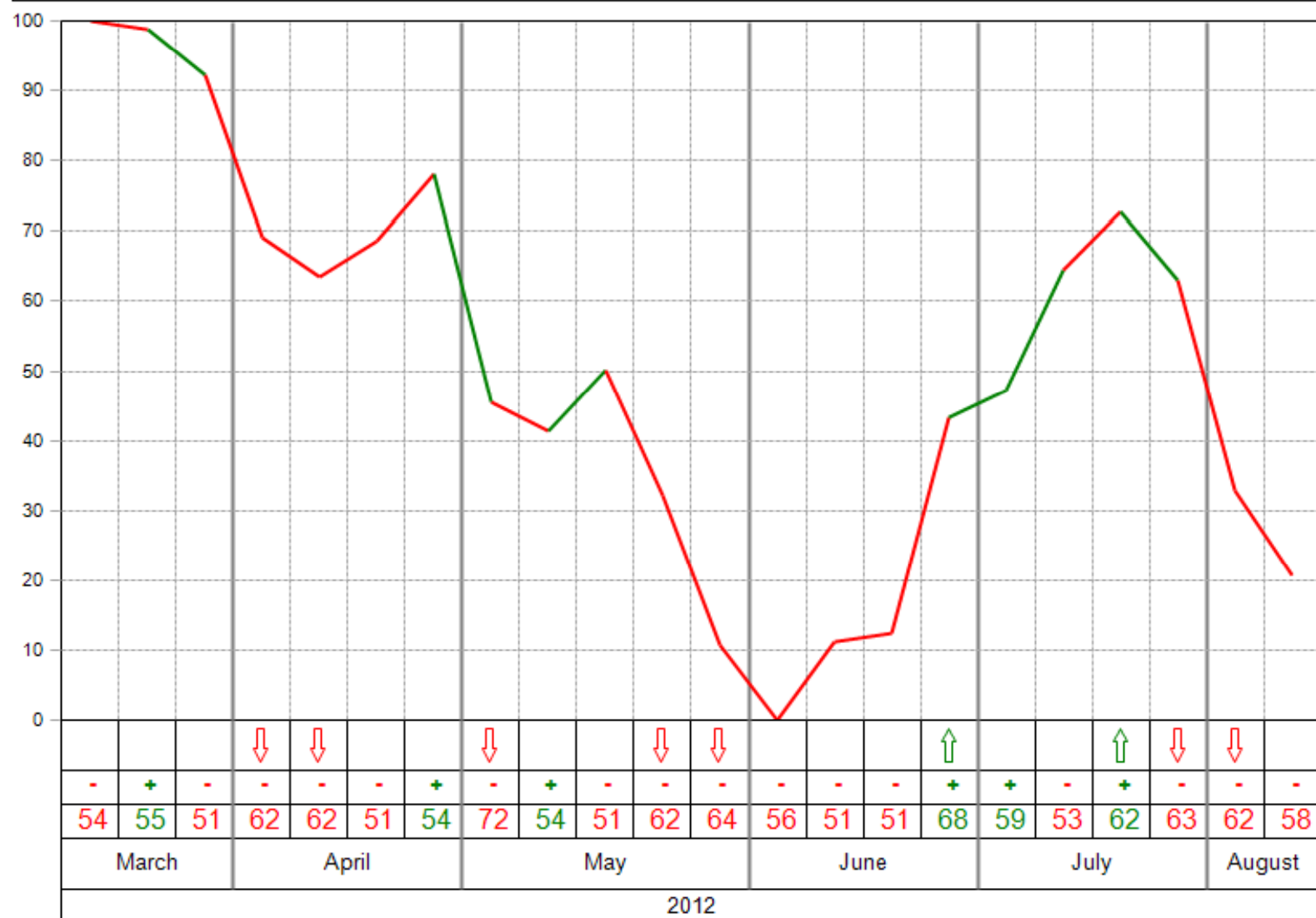


NIB: iPath DJ-UBS Cocoa ETN (Weekly bars)

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WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : September - Cocoa 1974 - 2012

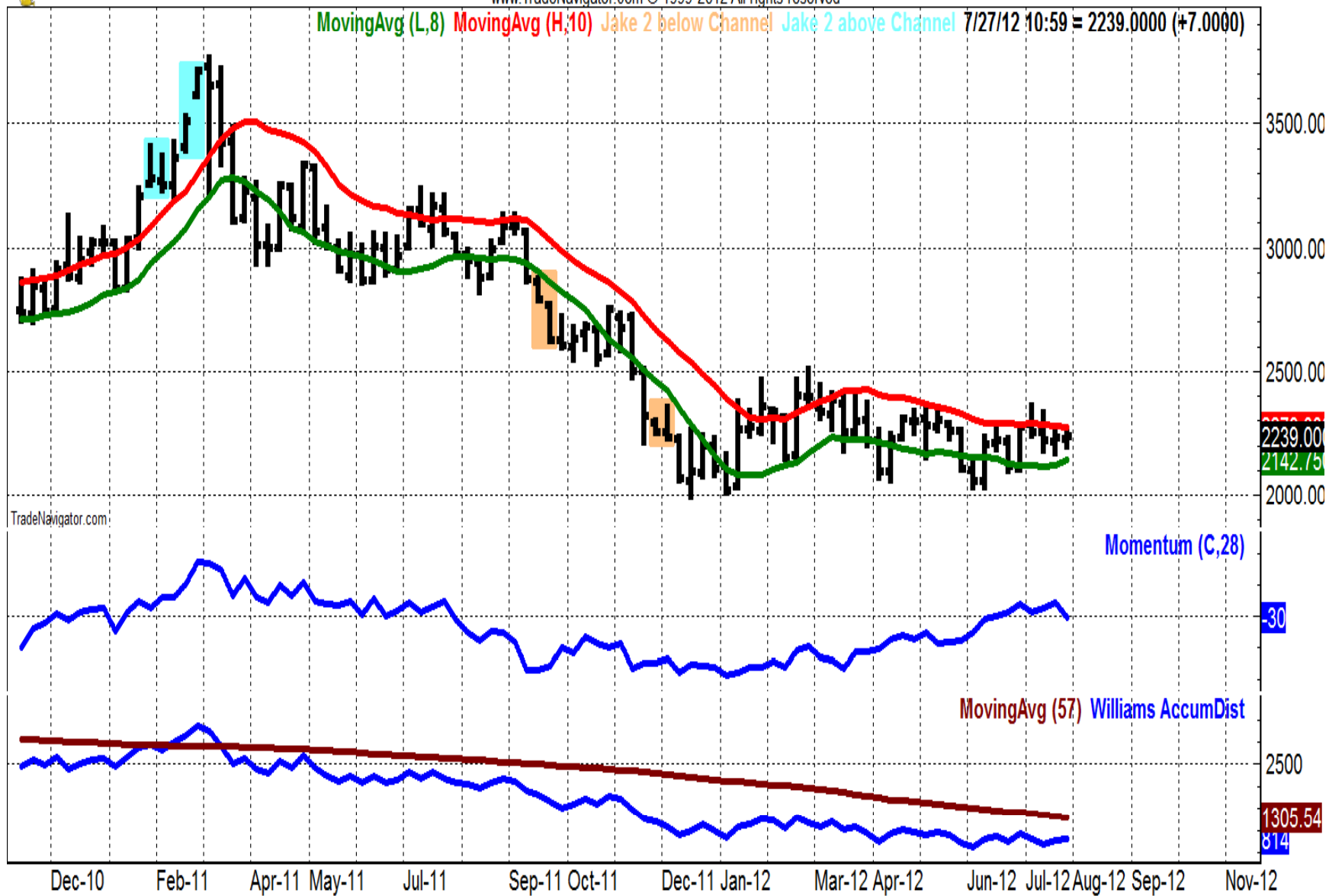




CC2-055: Cocoa NYBT (Comb) Cont 1st (Weekly bars)

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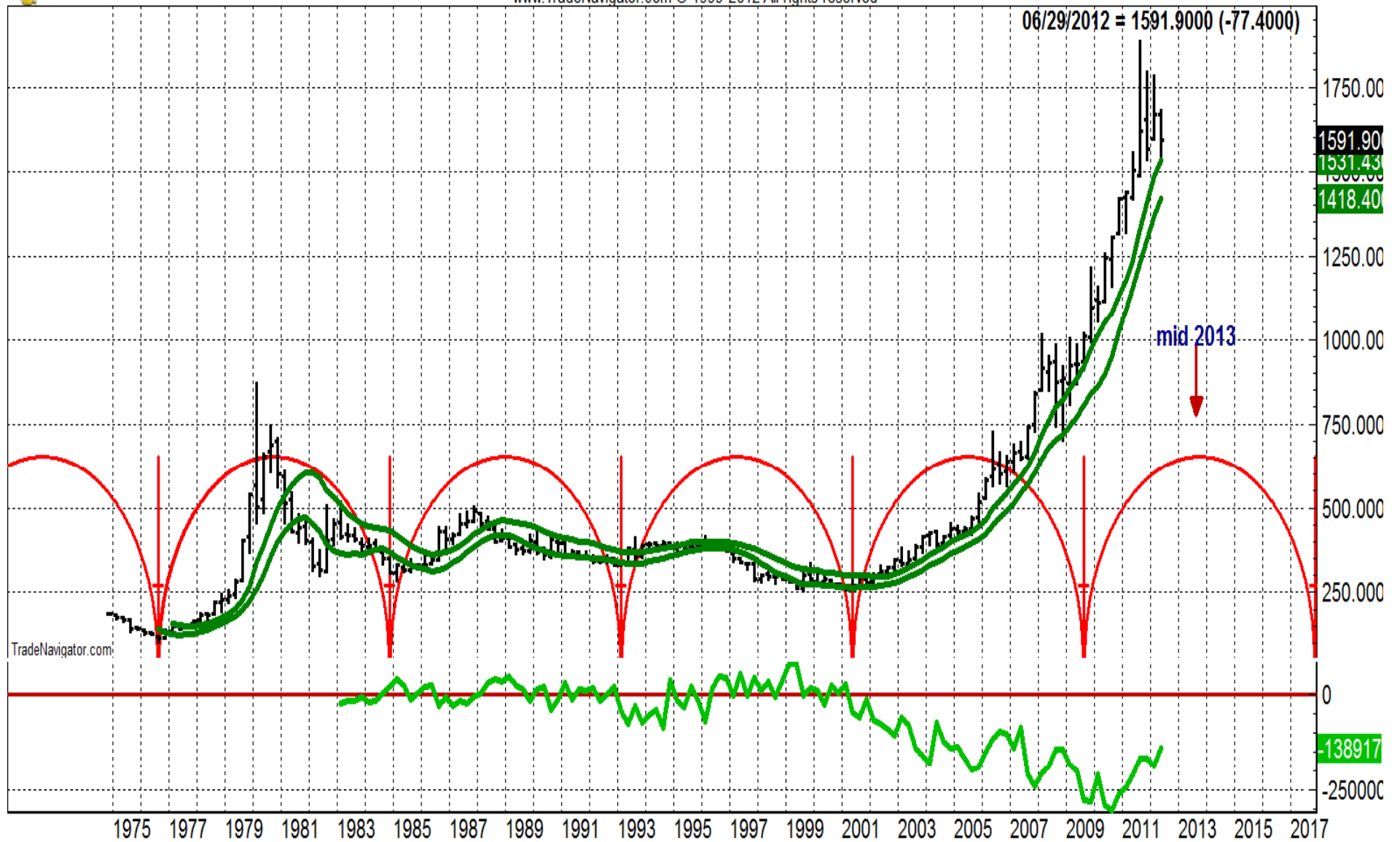
MovingAvg (L,8) MovingAvg (H,10) Jake 2 below Channel Jake 2 above Channel 7/27/12 10:59 = 2239.0000 (+7.0000)





GC-055: Gold Comex (Pit) Cont 1st (Quarterly bars)

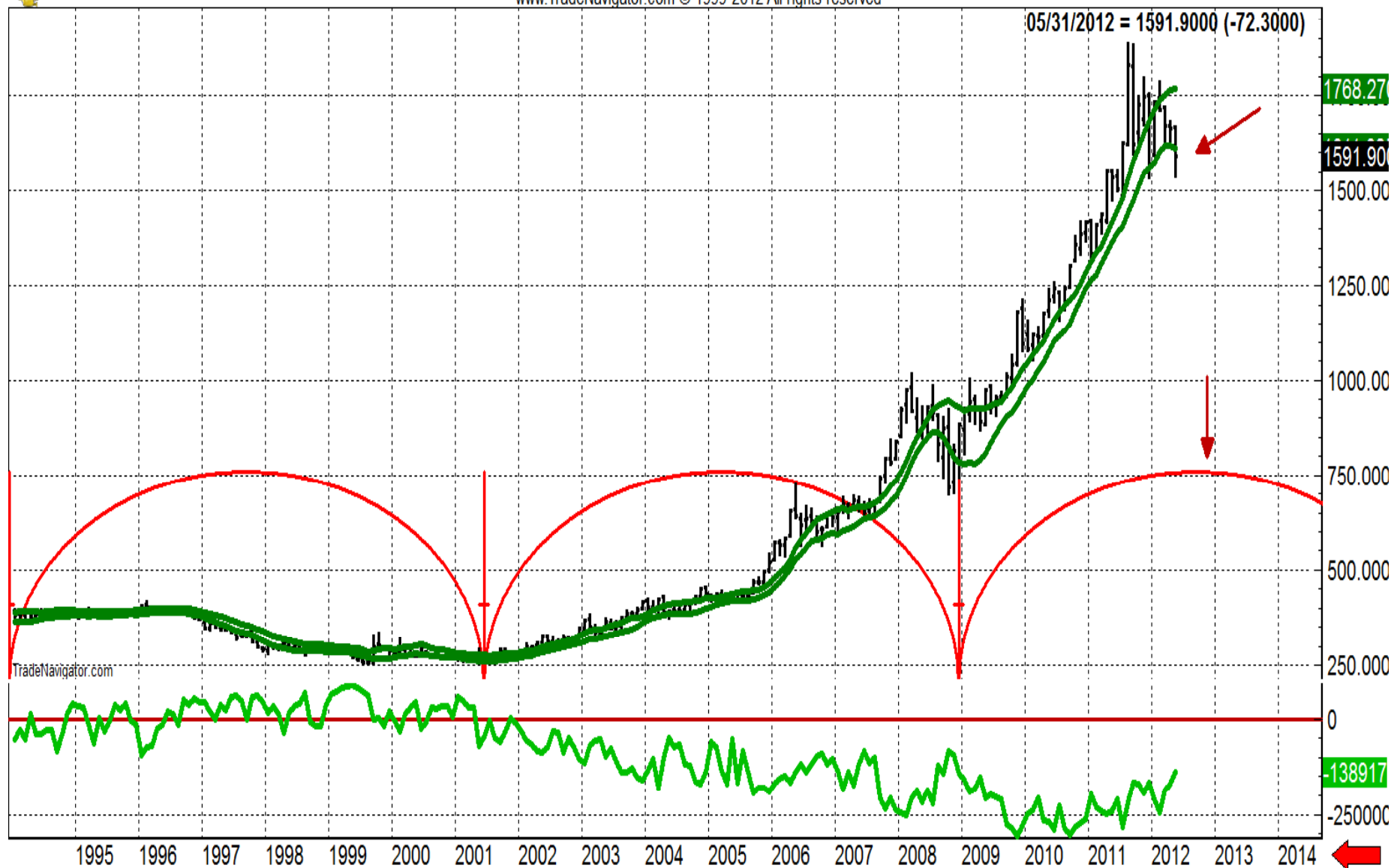
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GC-055: Gold Comex (Pit) Cont 1st (Monthly bars)

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GC2-055: Gold Comex (Comb) Cont 1st (Monthly bars)

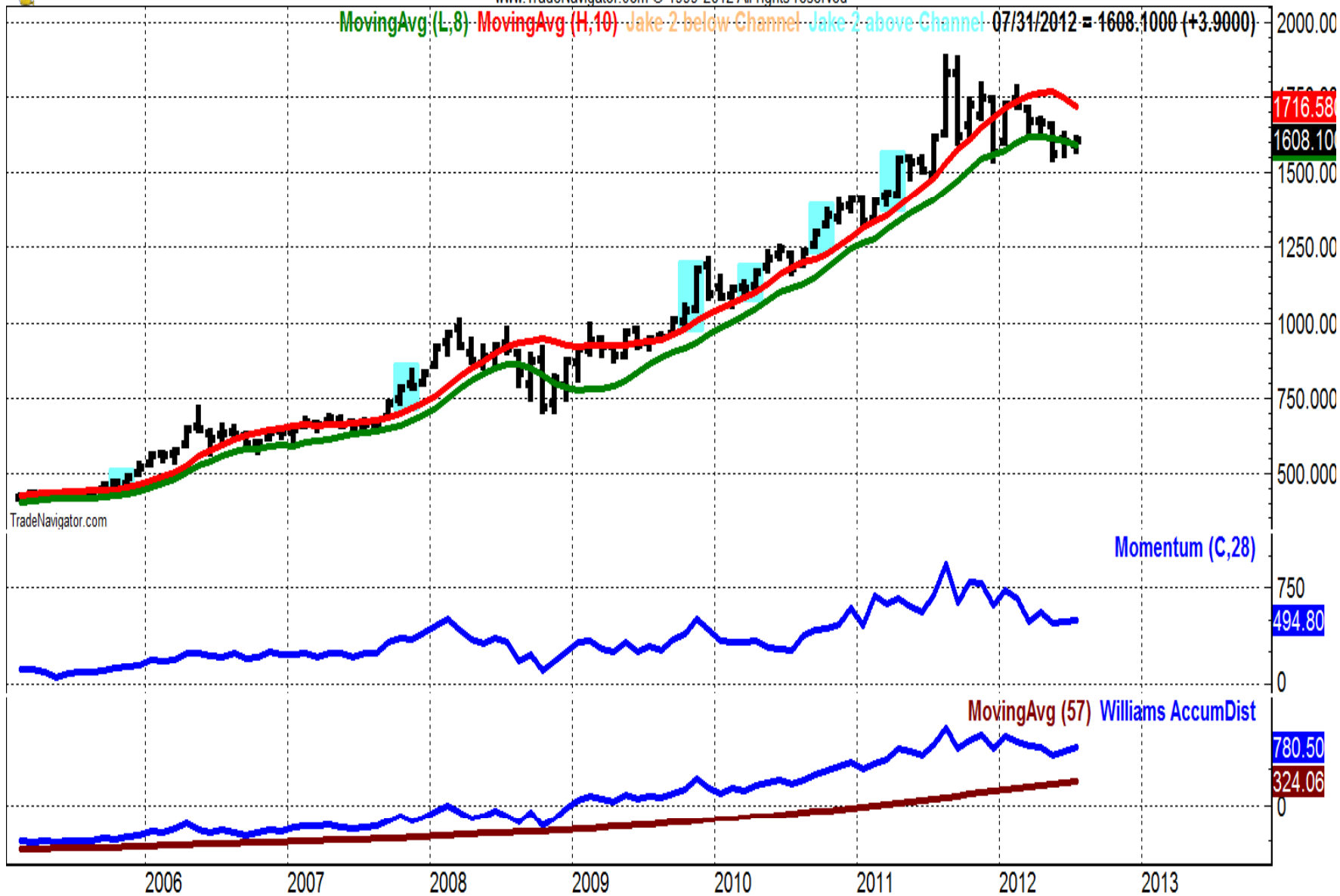
www.TradeNavigator.com © 1999-2012 All rights reserved



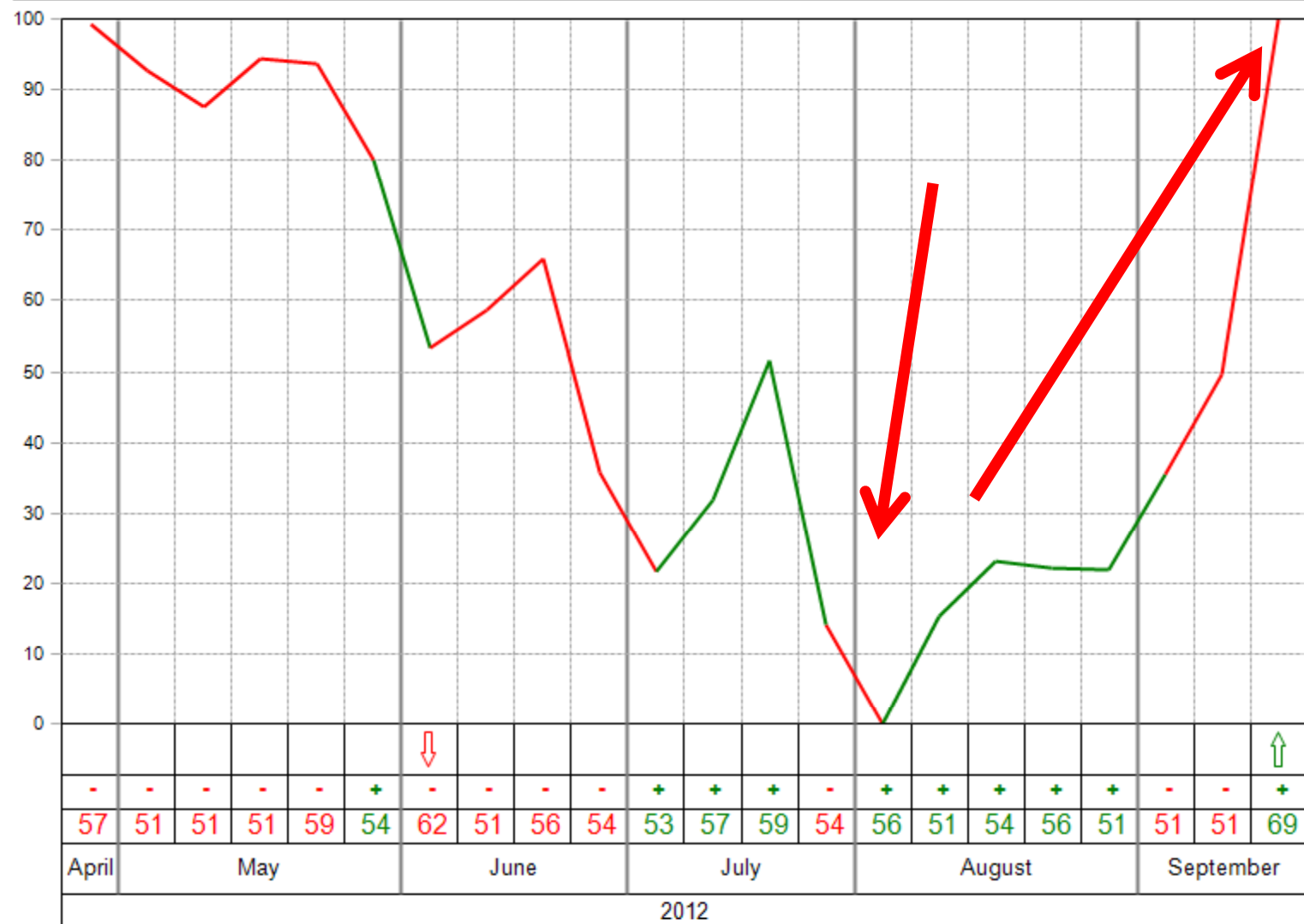


GC-055: Gold Comex (Pit) Cont 1st (Monthly bars)

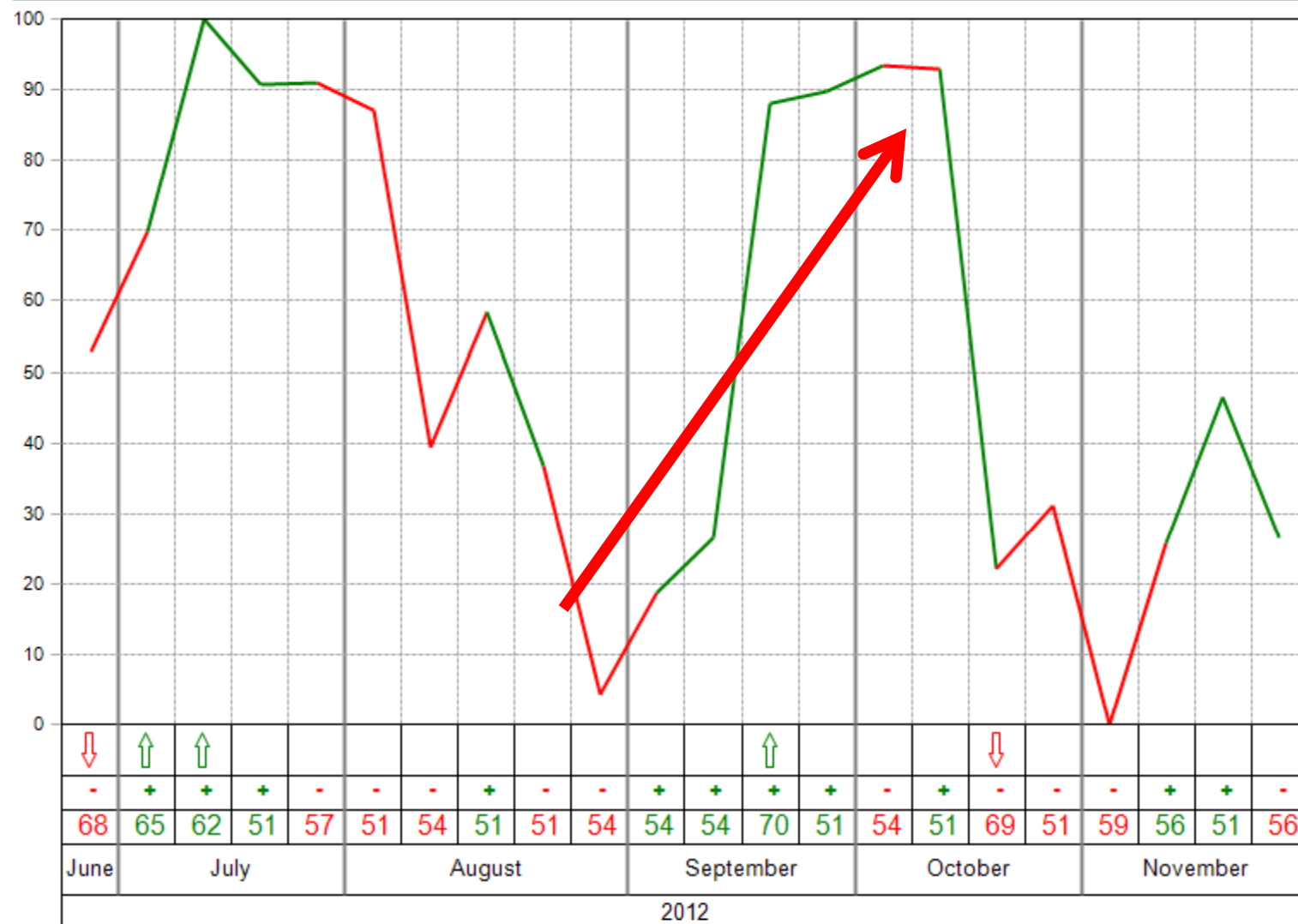
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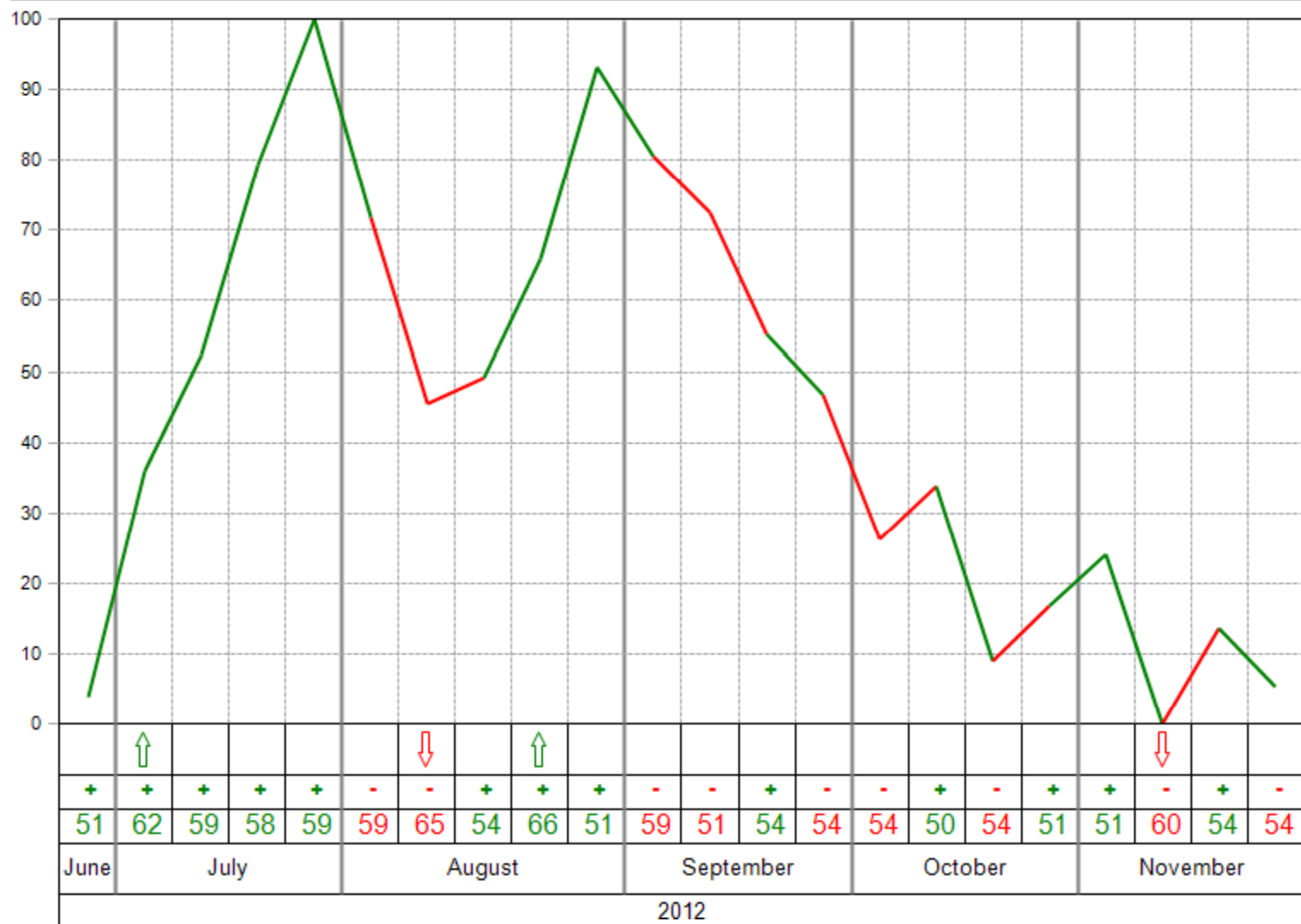
WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : October - Gold 1975 - 2012



WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - Silver 1975 - 2011



WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - Copper 1975 - 2011



Order Details



[Printer friendly version](#)

Order ID: 5542064 Order Date: 5/16/2012 Order Status: Order Shipped


Your payment method is Credit Card

Name on Card: jacob bernstein

Card Number: xxxxxxxxxxxxxx3798

Expires: 04/2016

Qty	Item	Price	Ext. Price
	MintDirect® 2012 1 oz Silver Eagles (20-Coin Tube)		
	1 oz Sunshine Minting Silver Round .999 Fine		
	1 oz Pamp Suisse Gold Bar .9999 Fine (In Assay)		
	1 oz Pamp Suisse Palladium Bar (w/ Assay) .999+ Fine		


US Dollar  Order Sub-Total:

S & H:

Total: **\$52,000**

Order Information

Your Payment Method is:
Credit Card

The currency you selected is:
US Dollar 

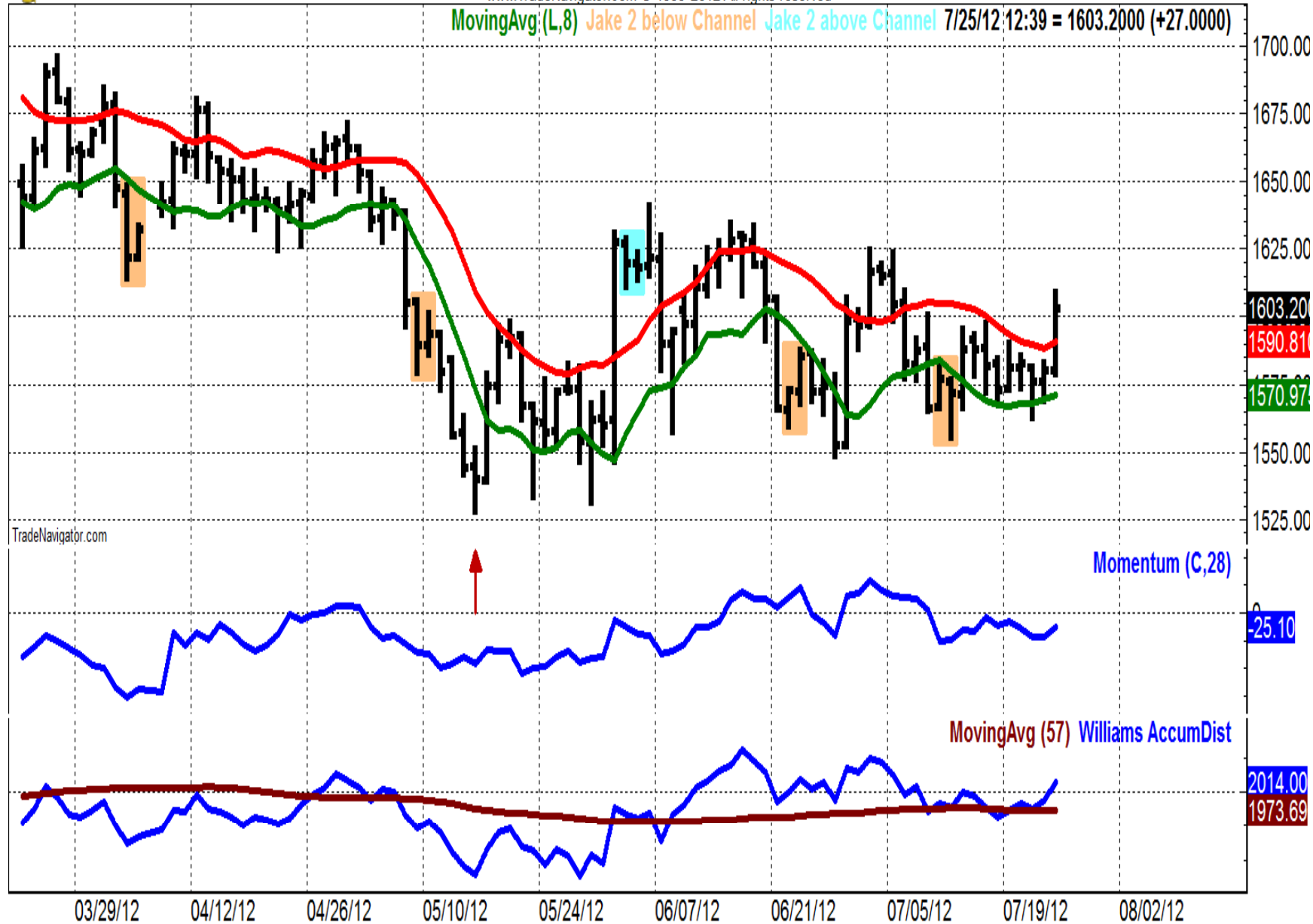
We are shipping your order to:
jacob bernstein
SANTA CRUZ, CA 95060-



GC2-055: Gold Comex (Comb) Cont 1st (Daily bars)

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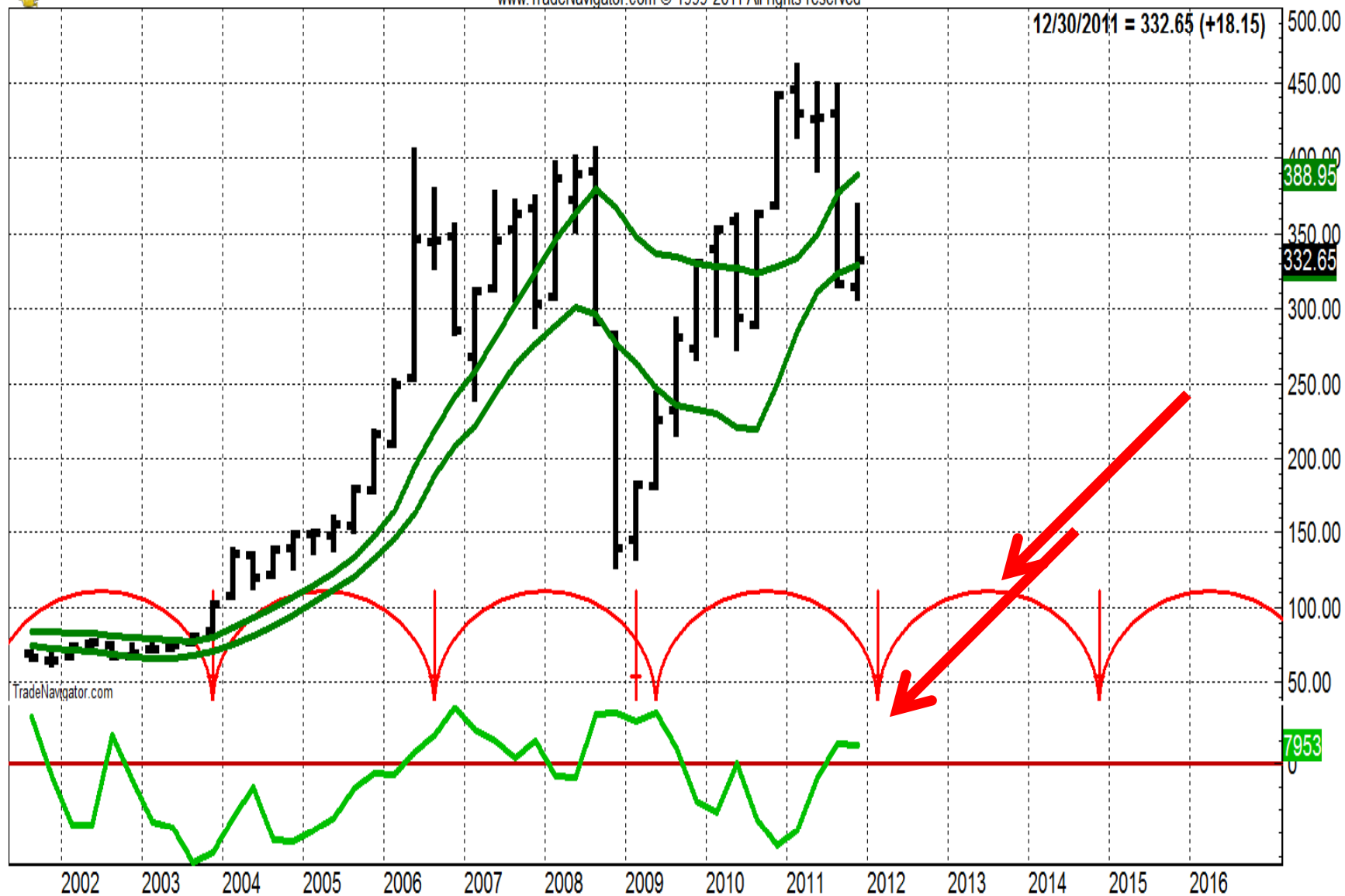
MovingAvg(L,8) Jake 2 below Channel Jake 2 above Channel 7/25/12 12:39 = 1603.2000 (+27.0000)





HG-055: Copper HG NYMX (Pit) Cont 1st (Quarterly bars)

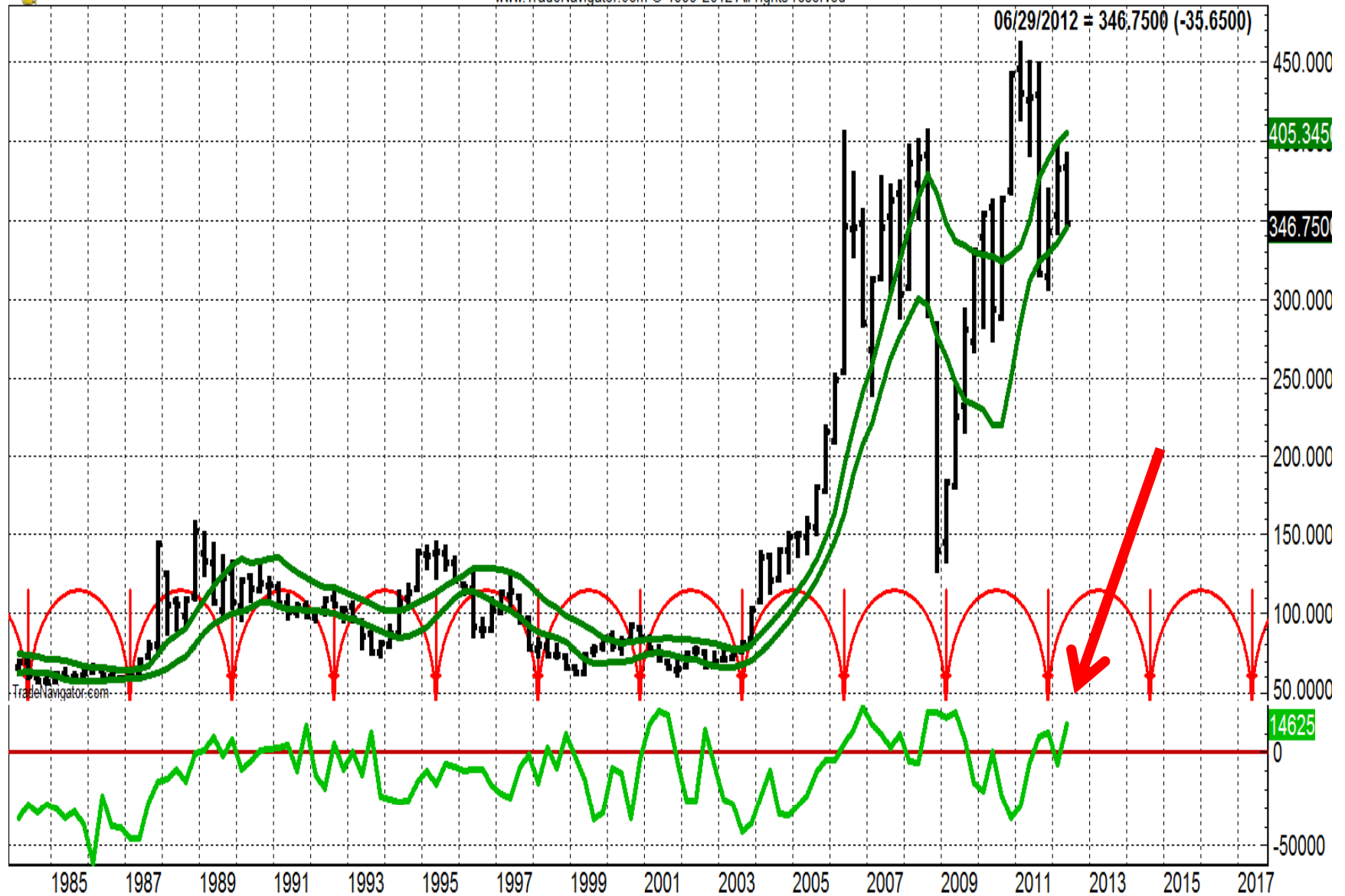
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HG-055: Copper HG NYMX (Pit) Cont 1st (Quarterly bars)

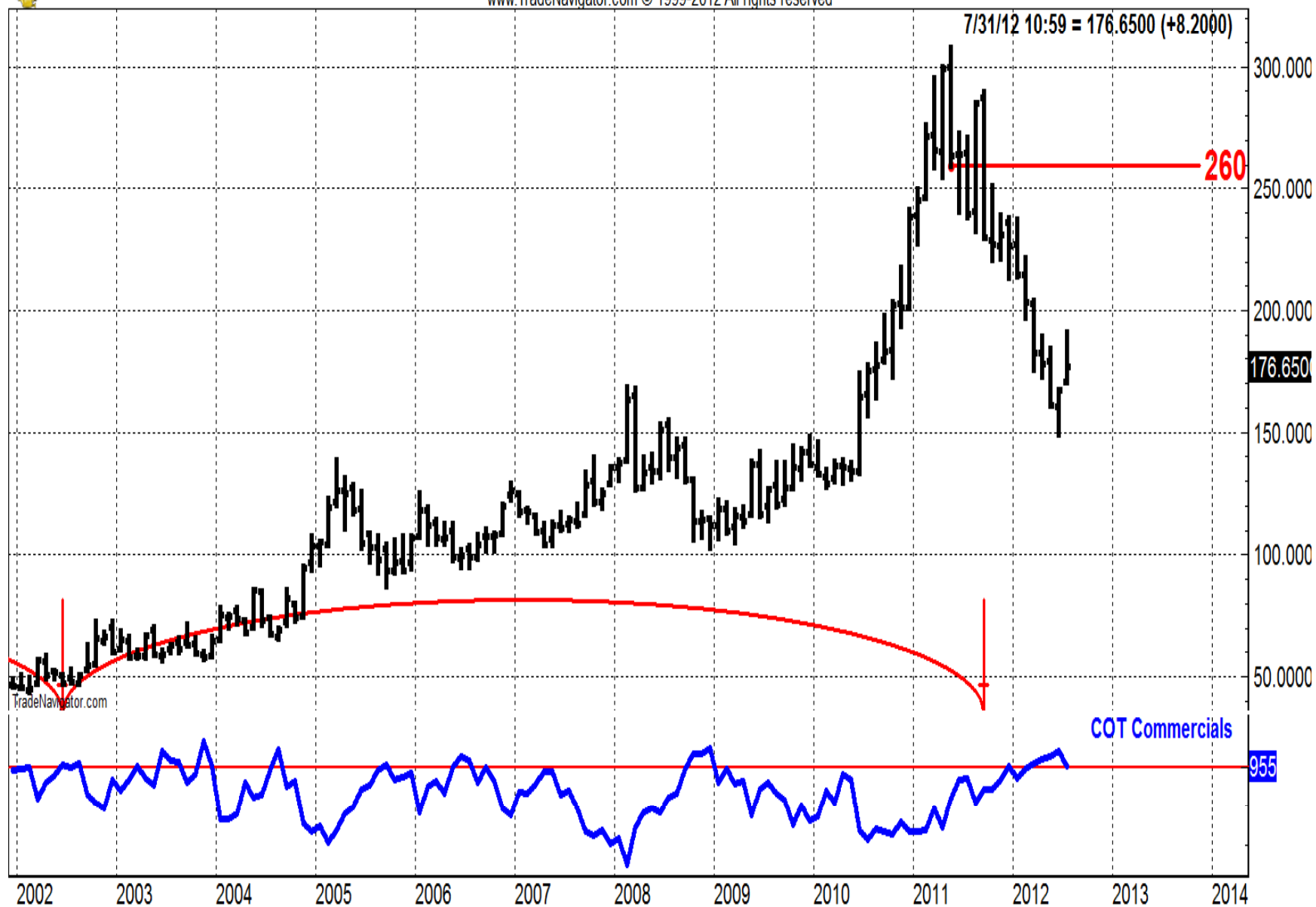
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KC-055: Coffee (Elec) Cont 1st (Monthly bars)

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PA-055: Palladium (Pit) Cont 1st (Monthly bars)

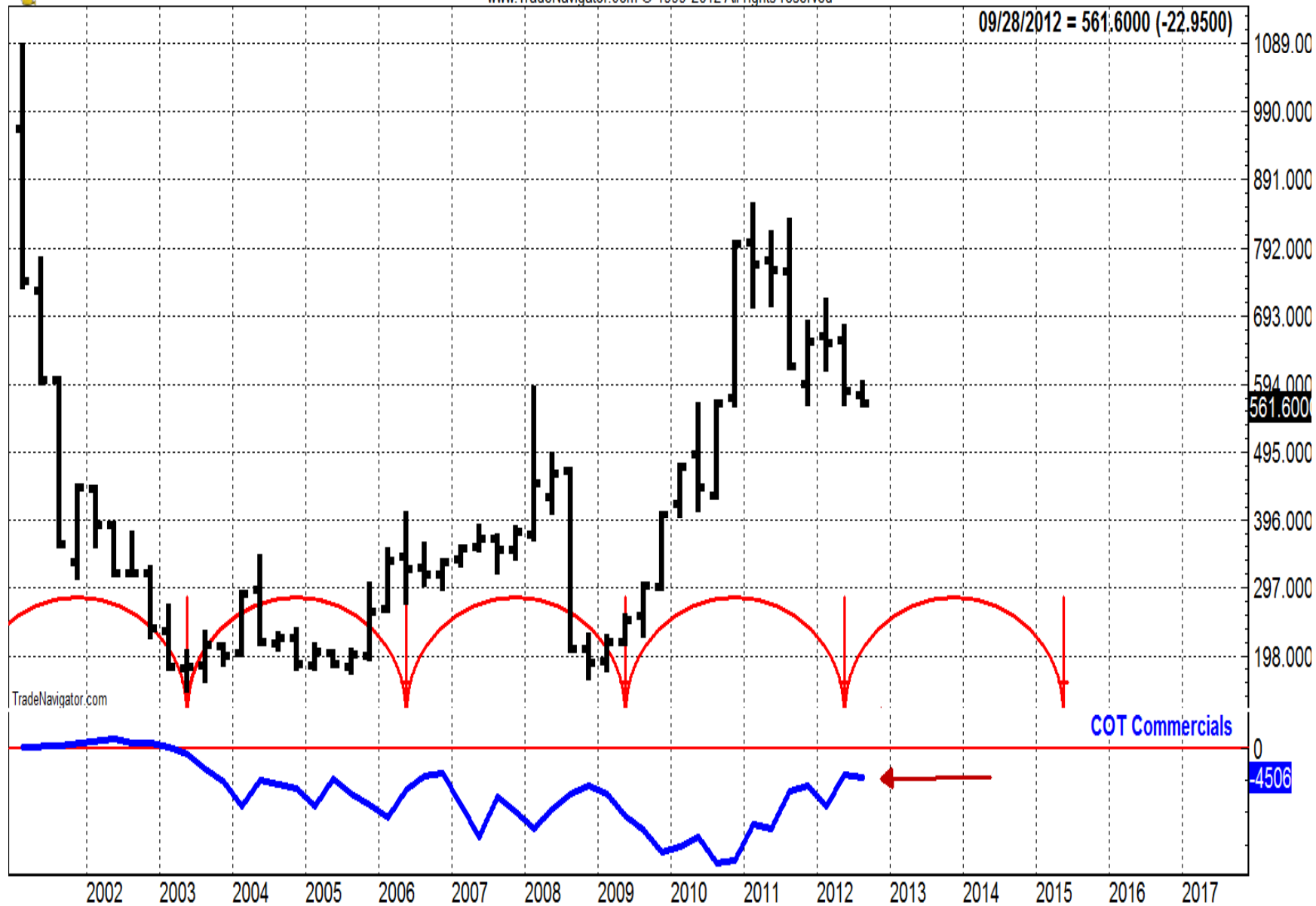
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PA-055: Palladium (Pit) Cont 1st (Quarterly bars)

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Precious metals recommendations

HL

PAL

GDXJ

NG

SLW

SIL

GOLD

FCX

SCCO

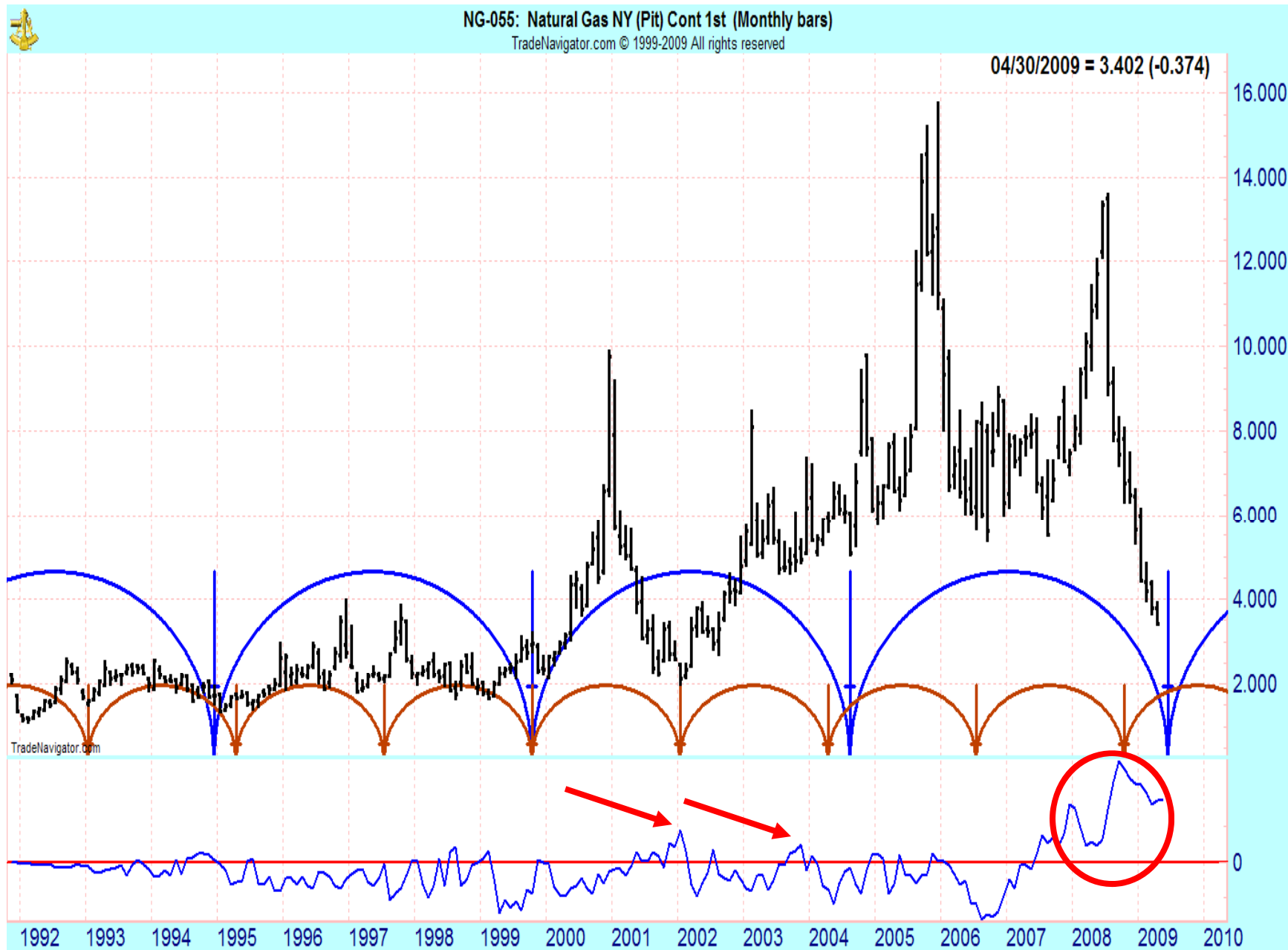
JJC (ETF)

TIE

MOLY

USEC *

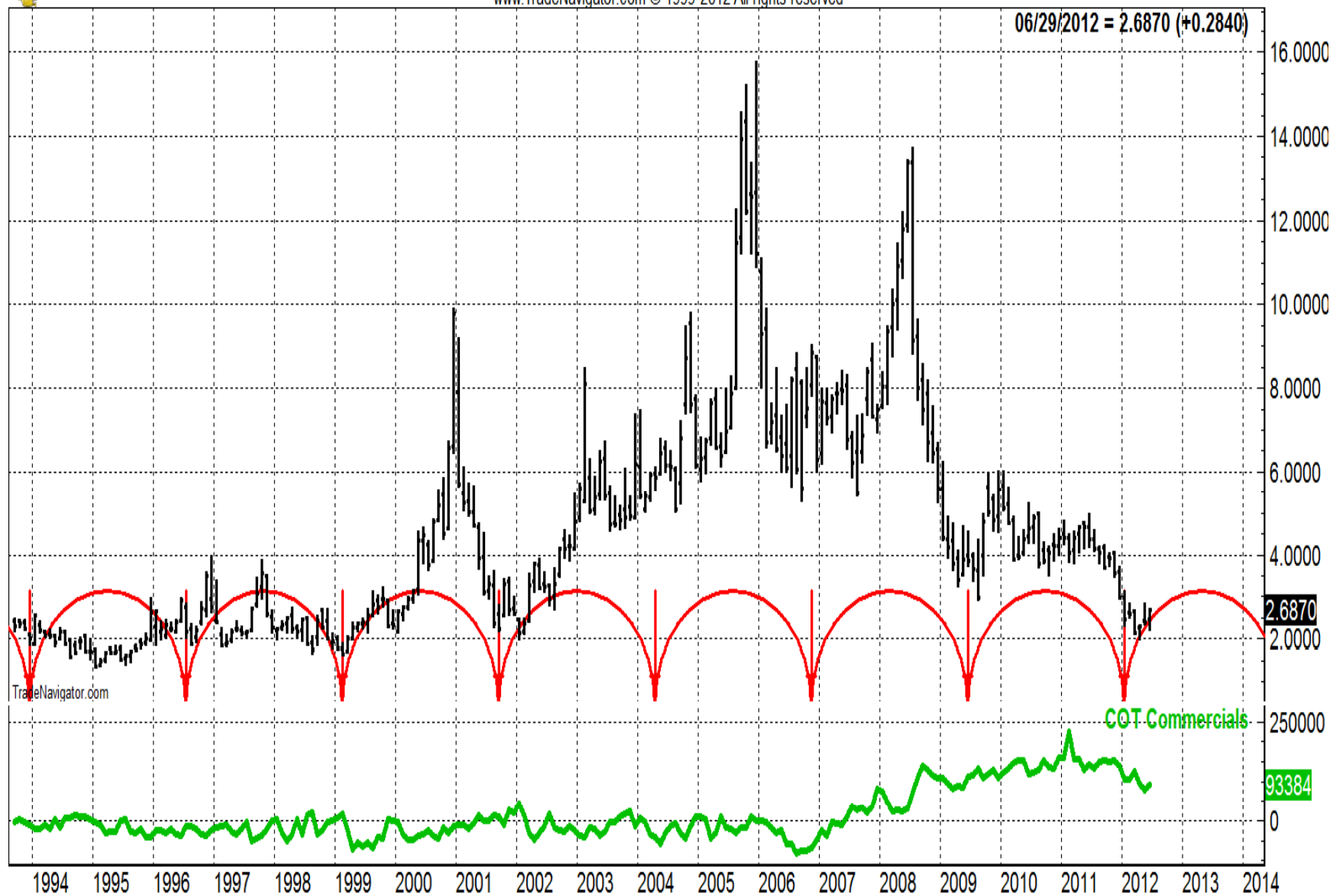
COT Commercials Nat Gas + Cycles





NG2-055: Natural Gas NY (Comb) Cont 1st (Monthly bars)

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NG2-055: Natural Gas NY (Comb) Cont 1st (Weekly bars)

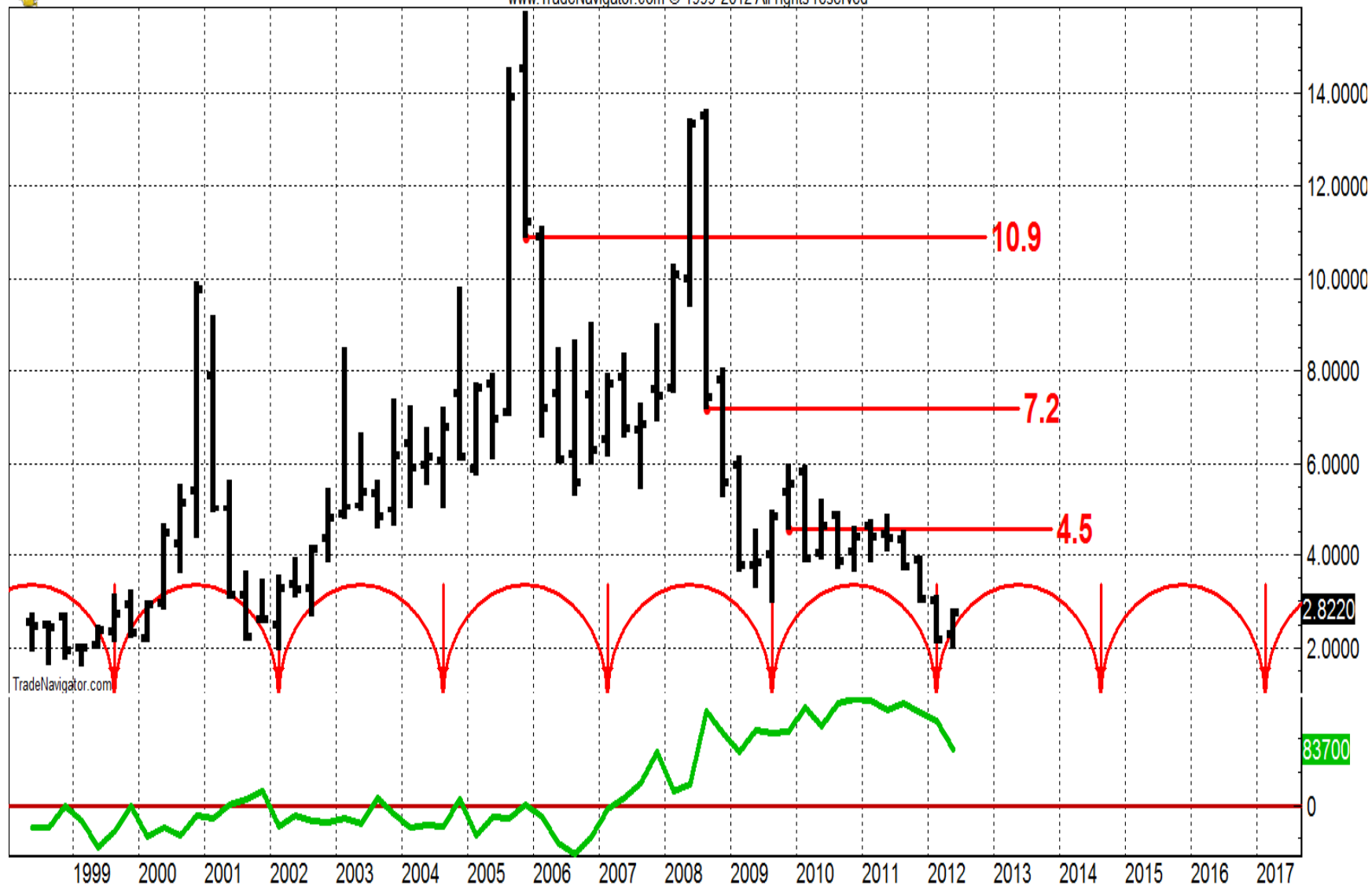
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NG-055: Natural Gas NY (Pit) Cont 1st (Quarterly bars)

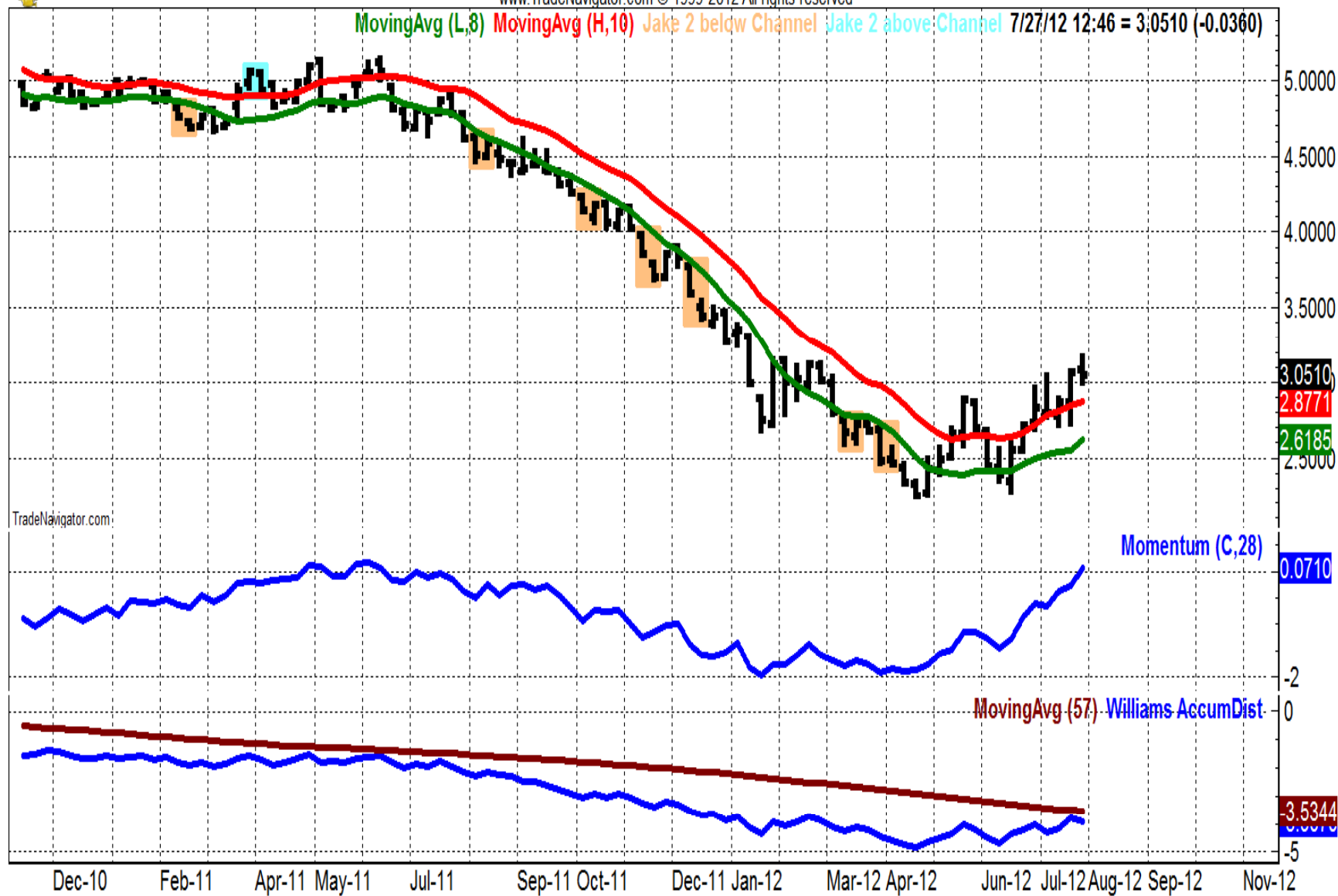
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NG2-201209: Natural Gas NY (Comb) Sep 12 (Weekly bars)

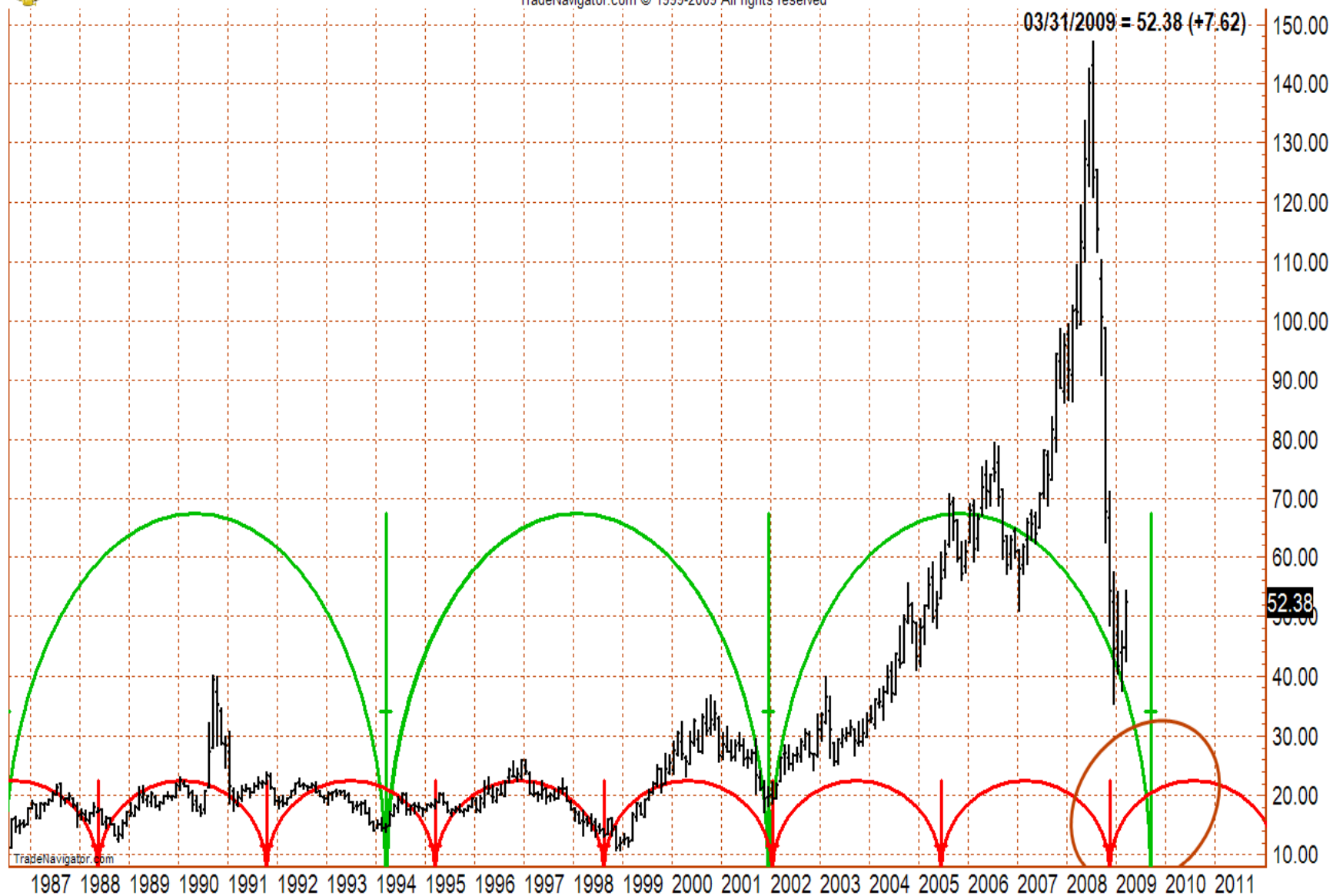
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CL-055: Crude Oil NY (Pit) Cont 1st (Monthly bars)

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CL2-055: Crude Oil NY (Comb) Cont 1st (Daily bars)

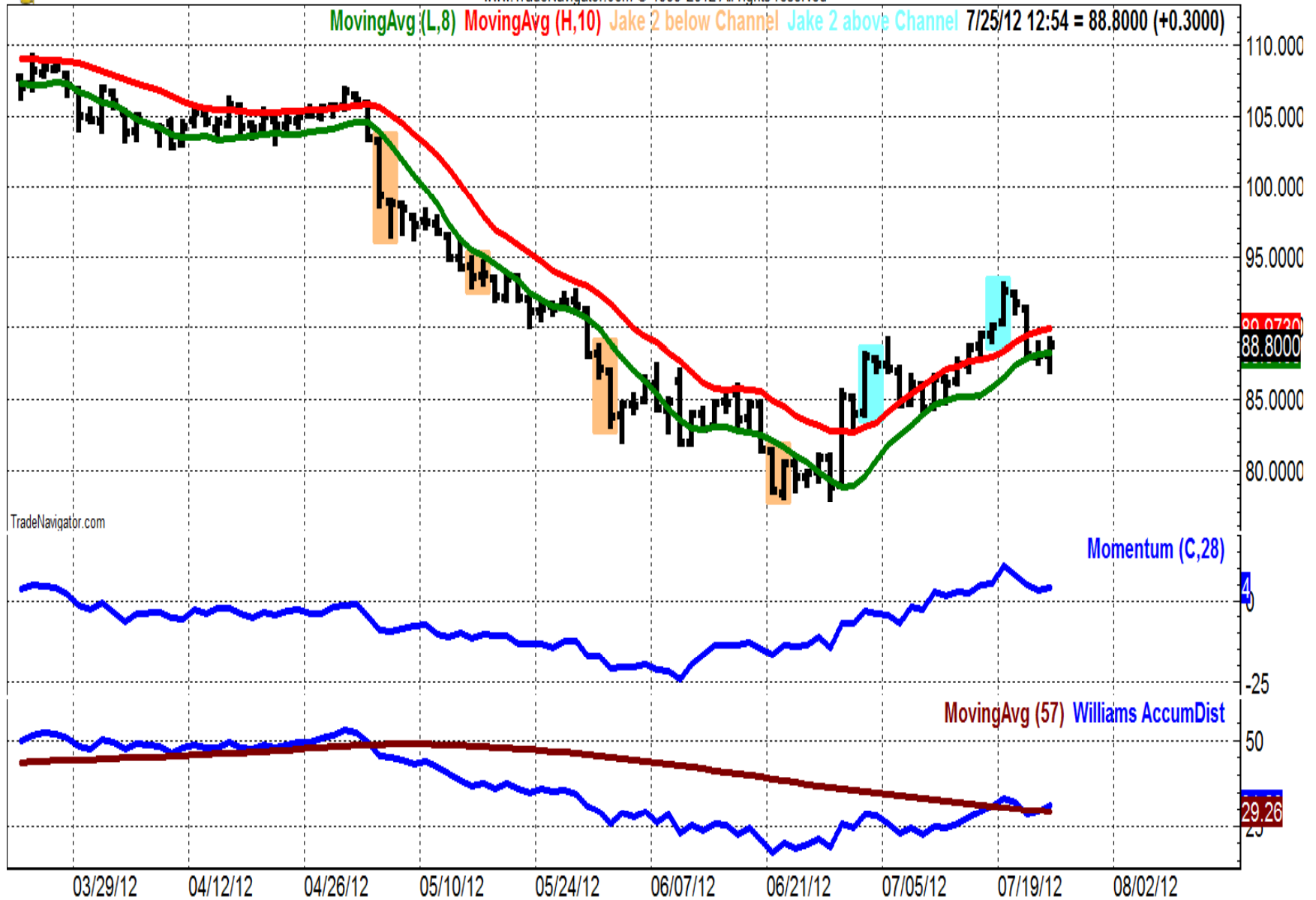
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CL2-201209: Crude Oil NY (Comb) Sep 2012 (Daily bars)

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Gas and energy related stocks

GAS

COG

EOG

OXY

HAL

SLB

TSO

KOG

LNG

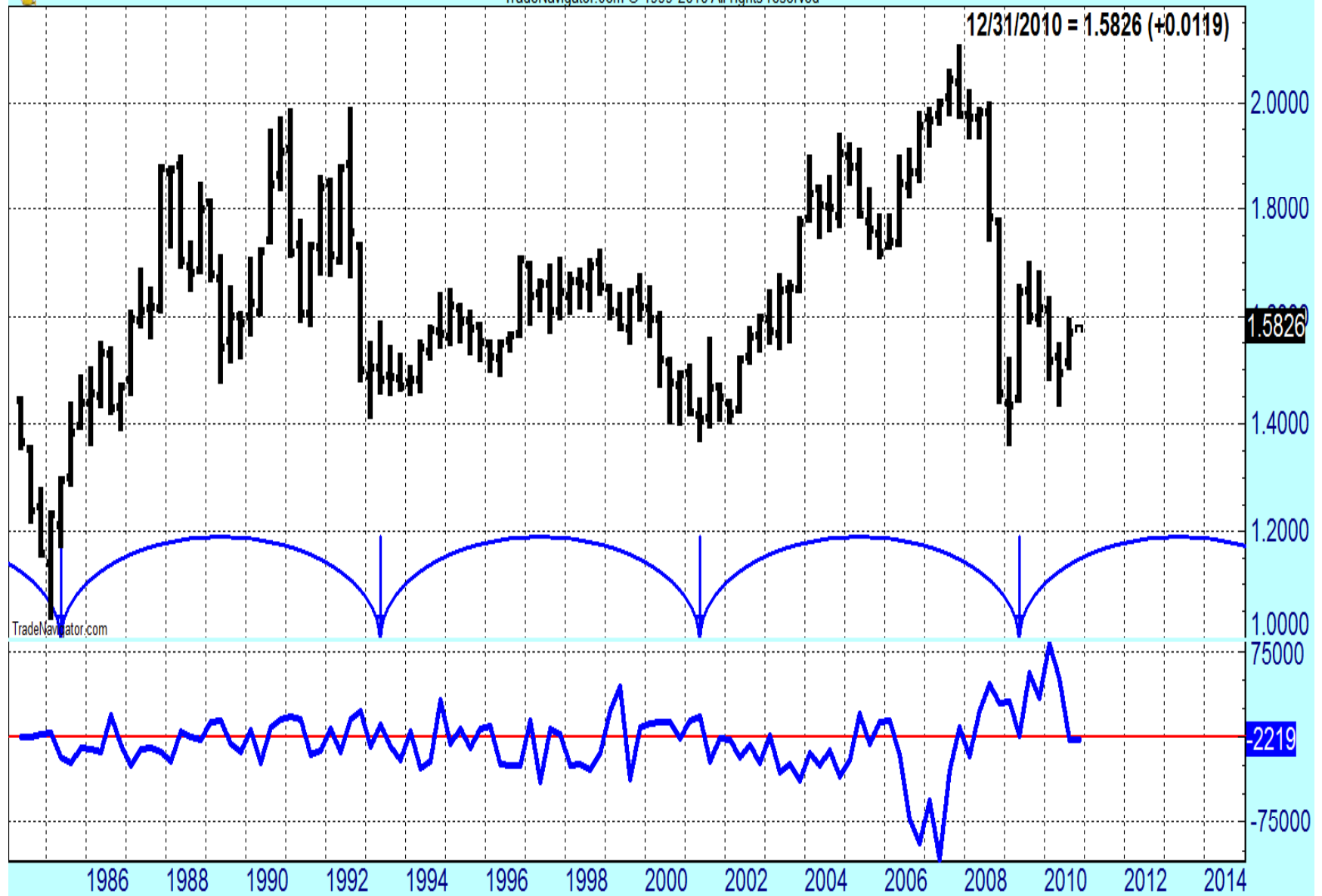
SD

TPLM



BP-055: British Pound (Pit) Cont 1st (Quarterly bars)

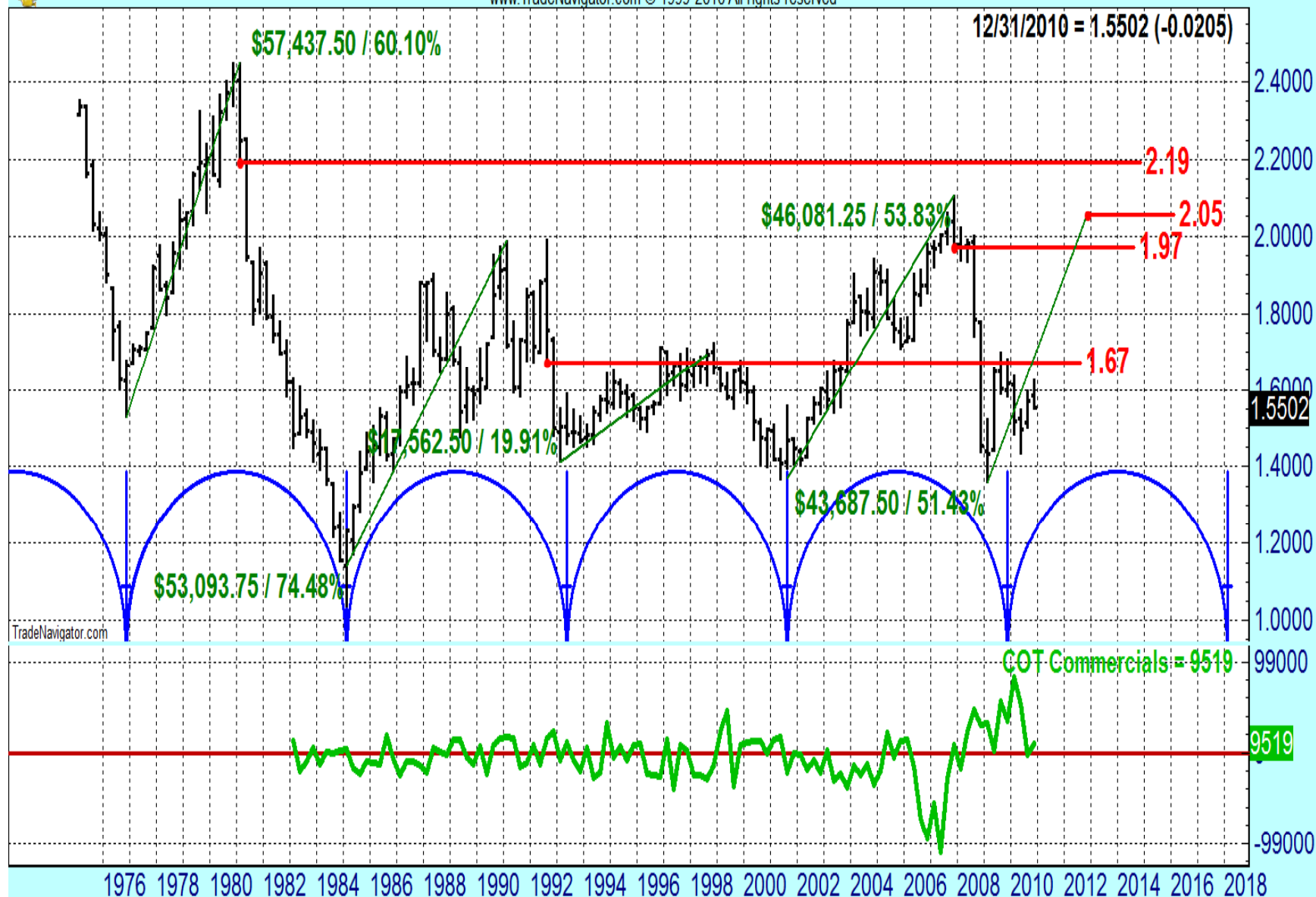
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BP-055: British Pound (Pit) Cont 1st (Quarterly bars)

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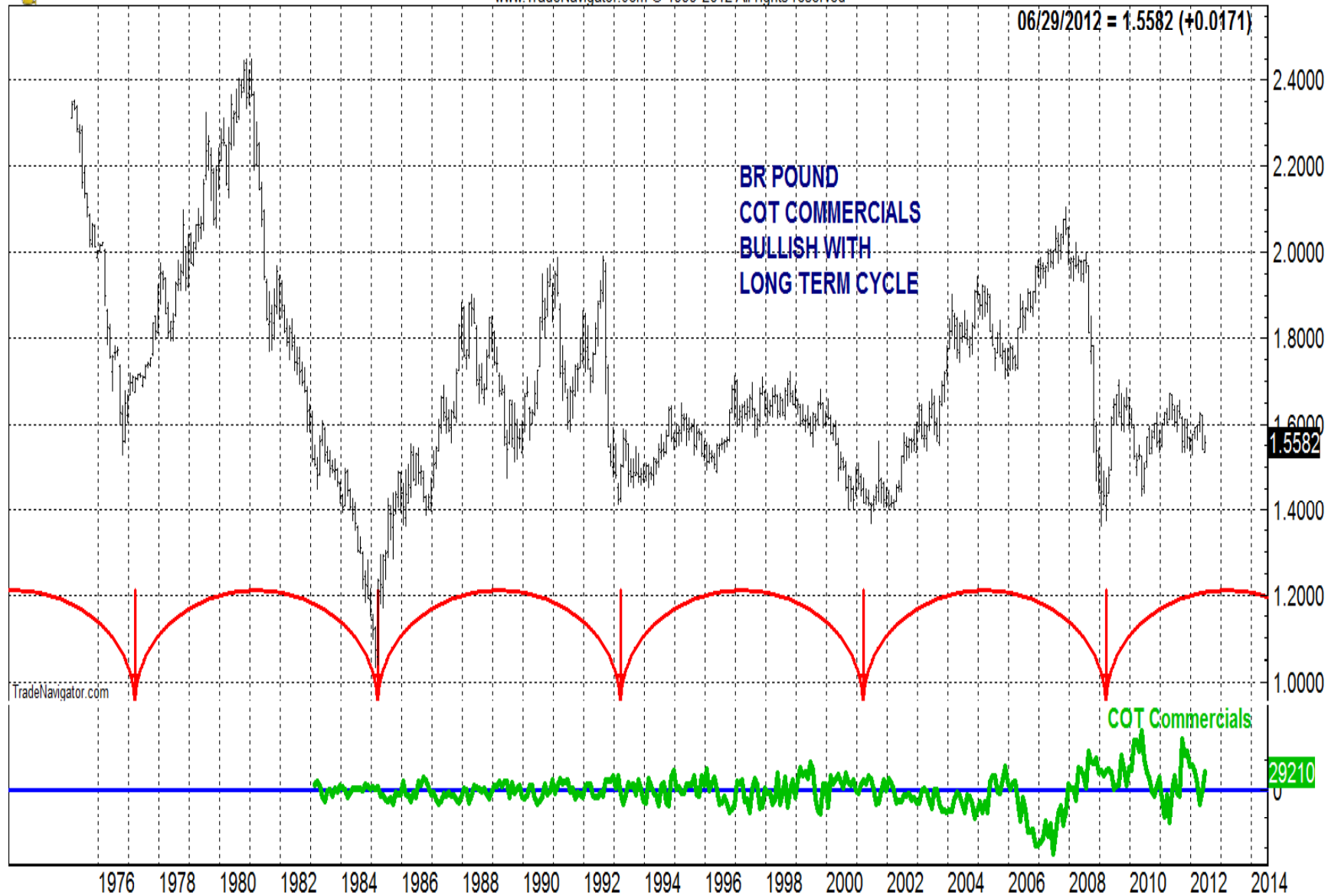




BP-055: British Pound (Pit) Cont 1st (Monthly bars)

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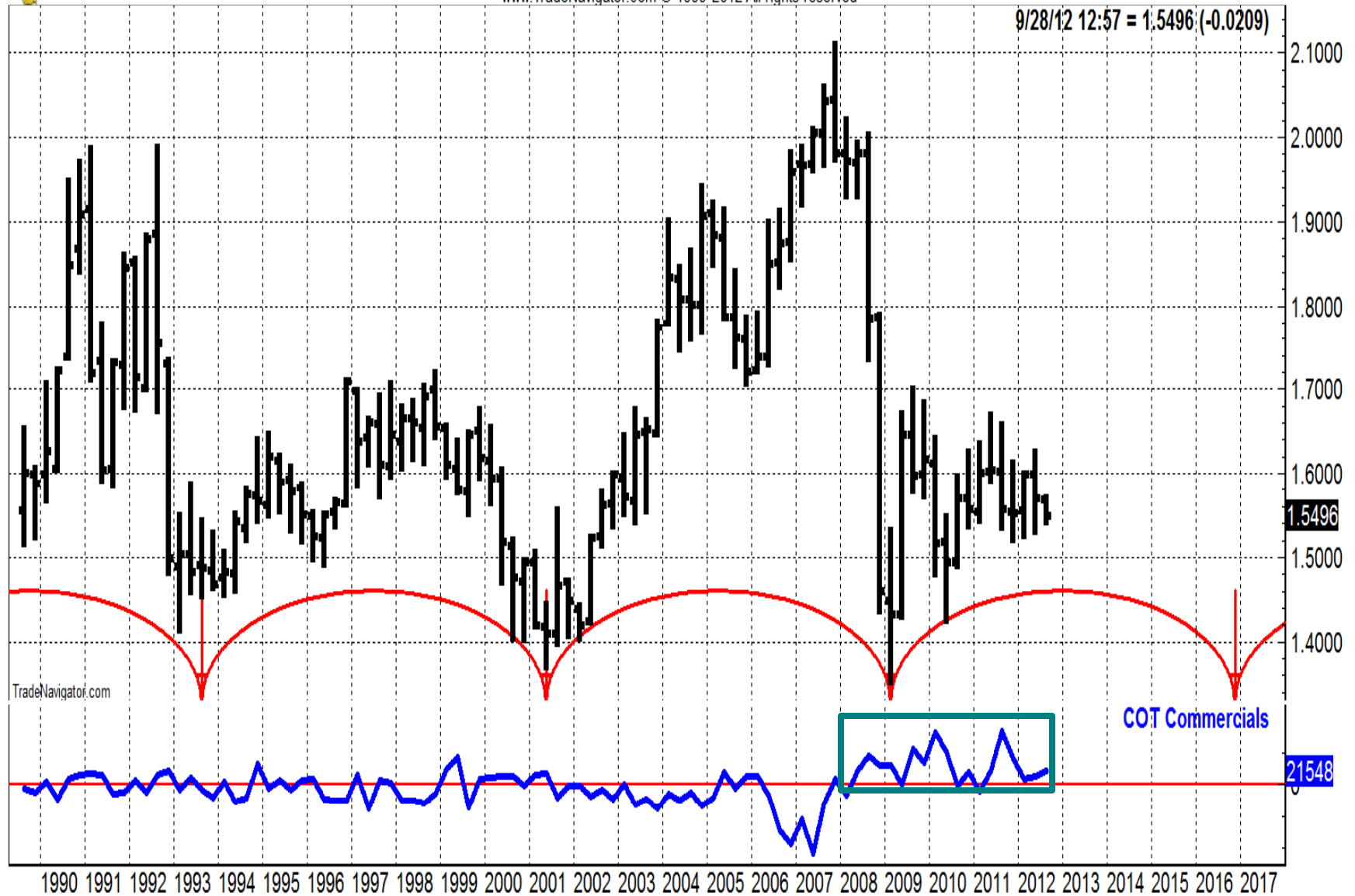
06/29/2012 = 1.5582 (+0.0171)





G6B-055: British Pound (Elec) Cont 1st (Quarterly bars)

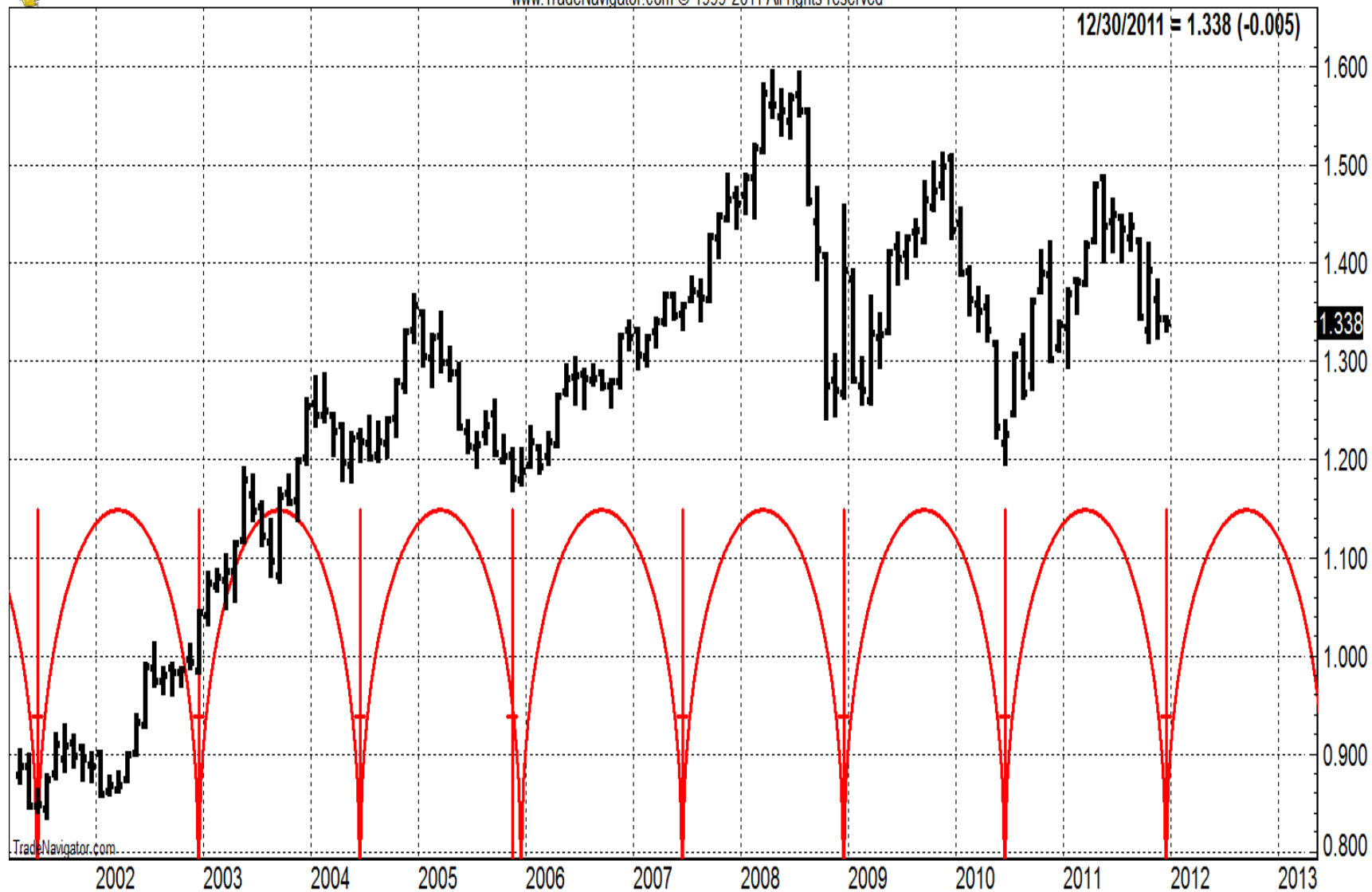
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EU-055: Euro FX (Pit) Cont 1st (Monthly bars)

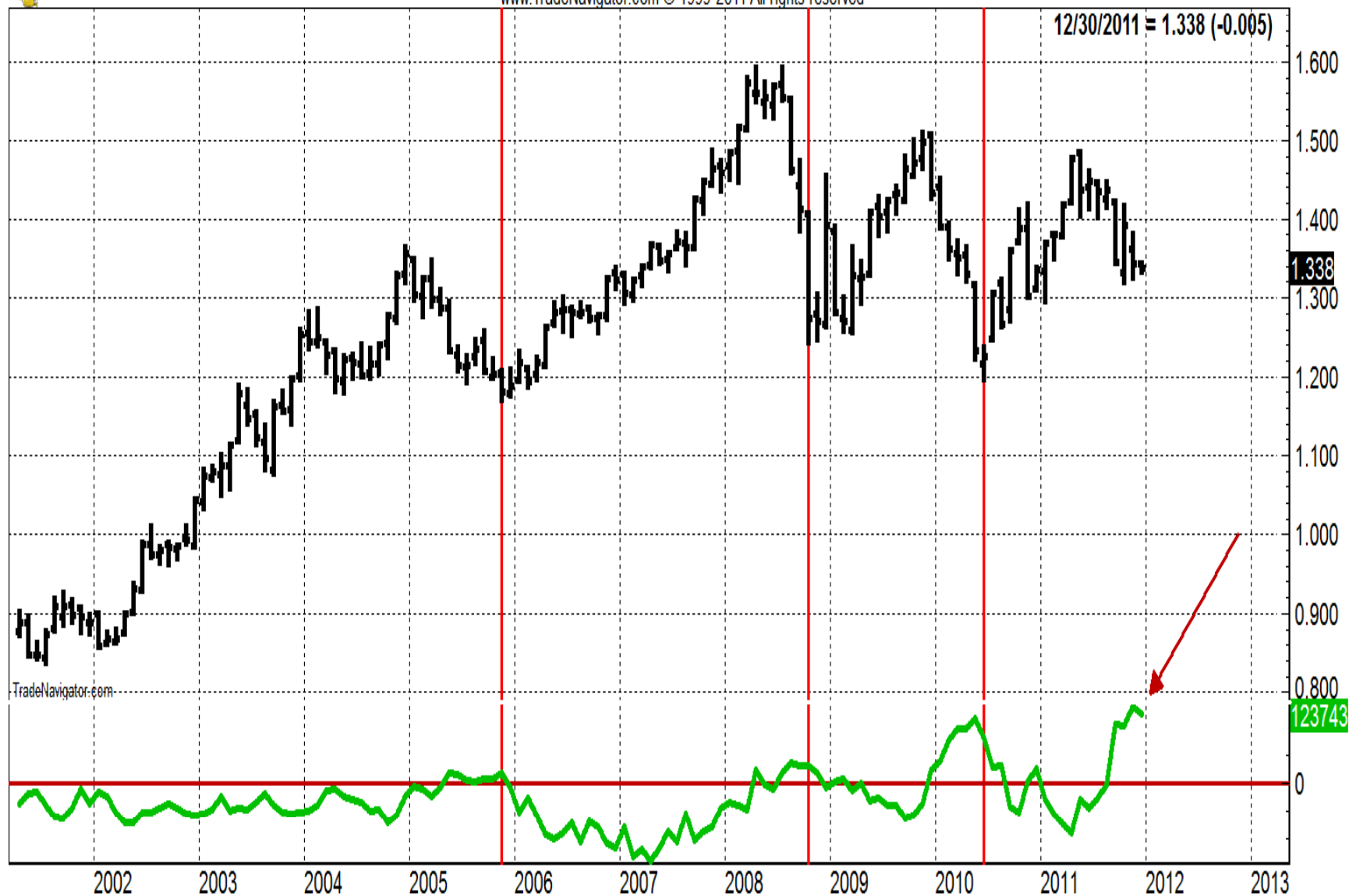
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EU-055: Euro FX (Pit) Cont 1st (Monthly bars)

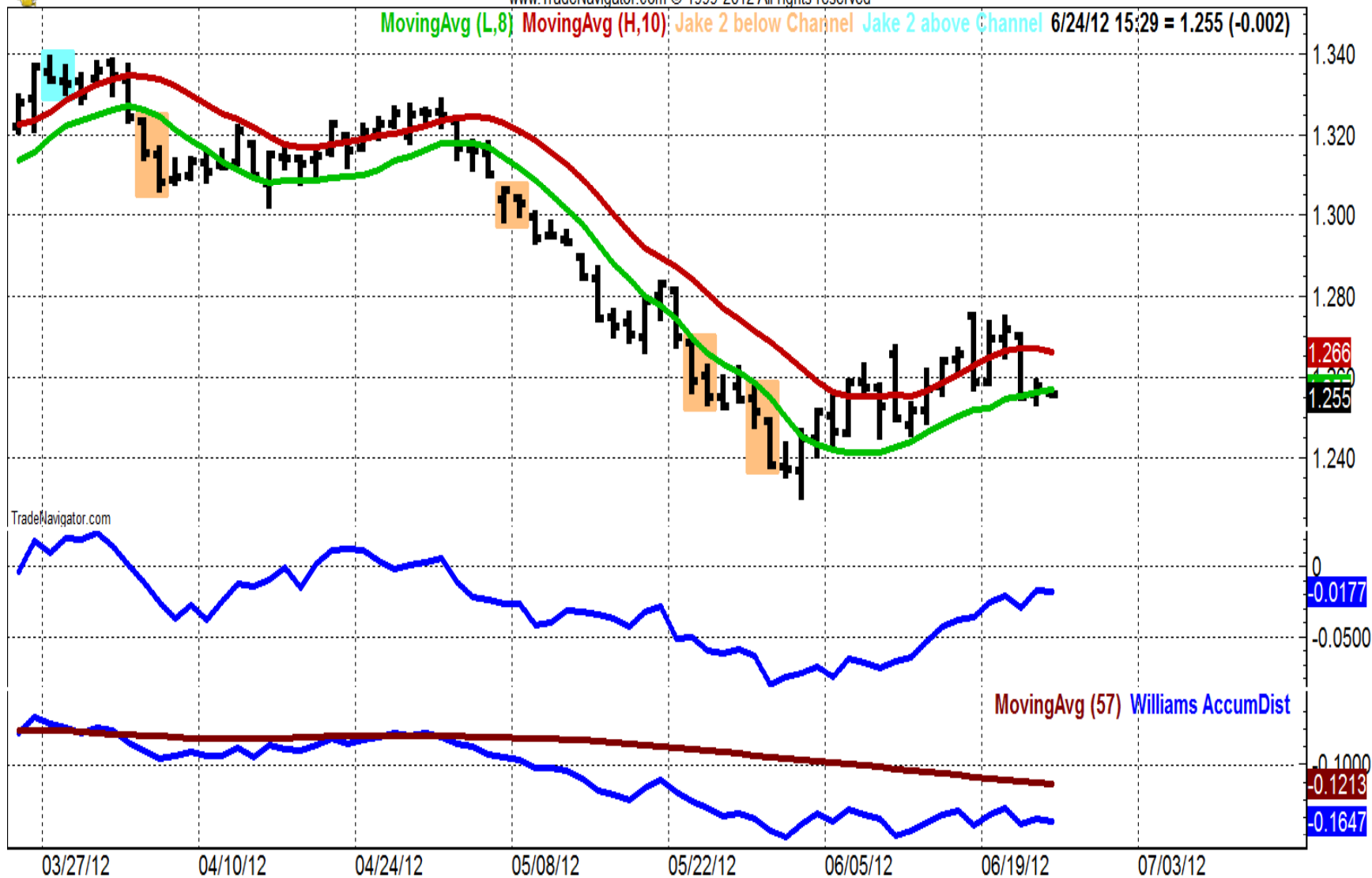
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G6E-201209: Euro FX (Elec) Sep 2012 (Daily bars)

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G6E-055: Euro FX (Elec) Cont 1st (Weekly bars)

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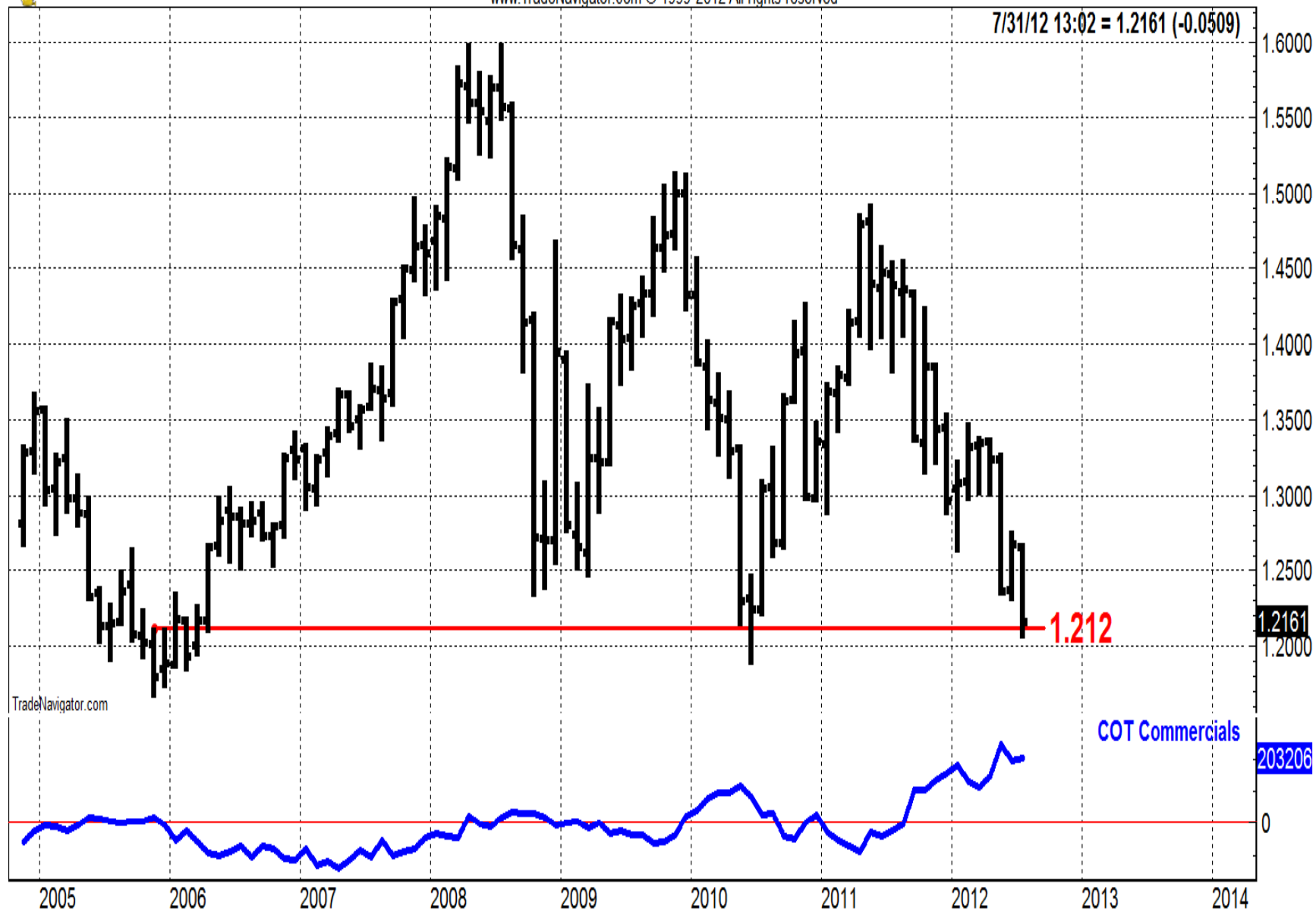
MovingAvg (L,8) MovingAvg (H,10) Jake 2 below Channel Jake 2 above Channel 6/28/12 15:30 = 1.255 (-0.002)





G6E-055: Euro FX (Elec) Cont 1st (Monthly bars)

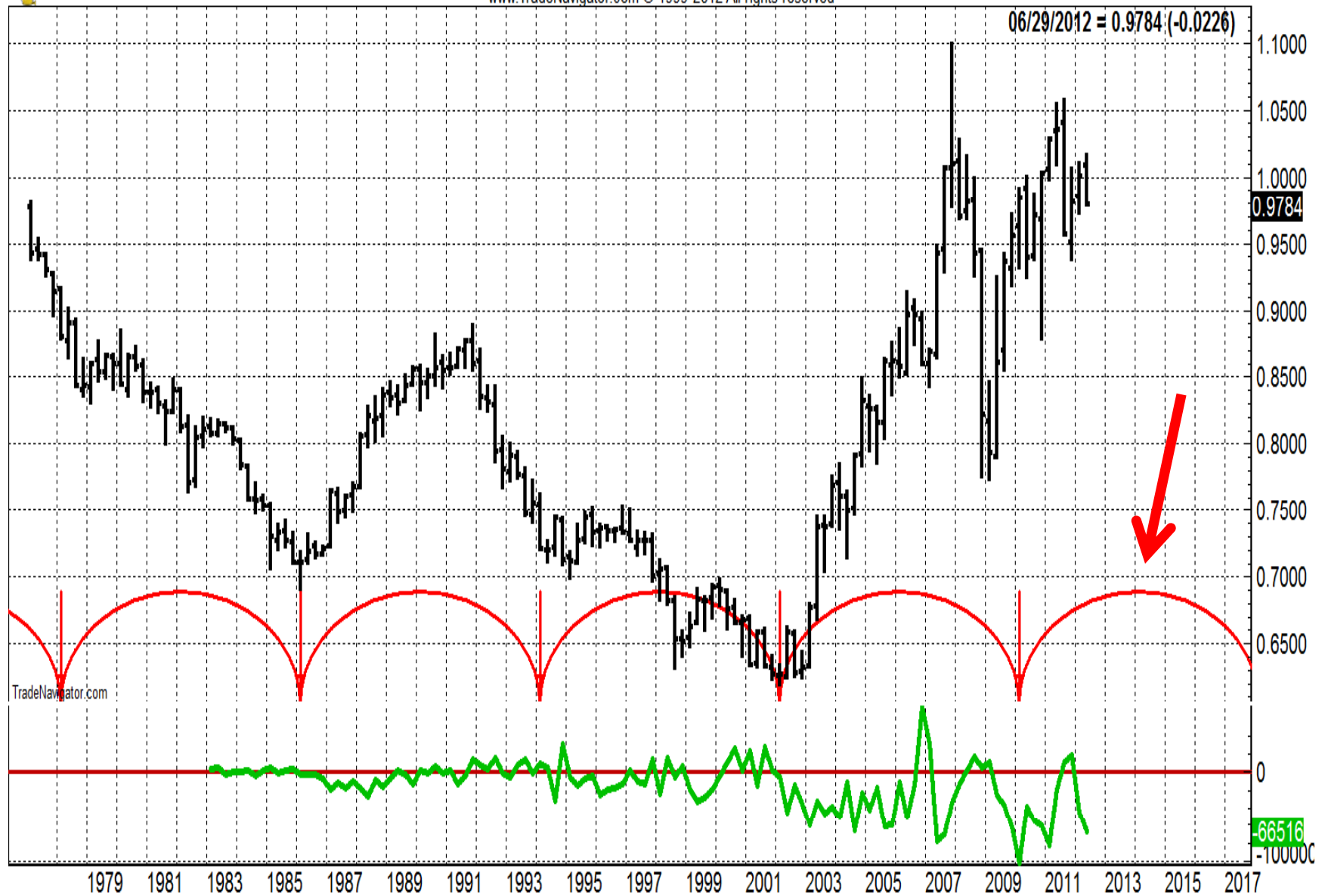
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CD-055: Canadian \$ (Pit) Cont 1st (Quarterly bars)

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G6C-055: Canadian \$ (Elec) Cont 1st (Daily bars)

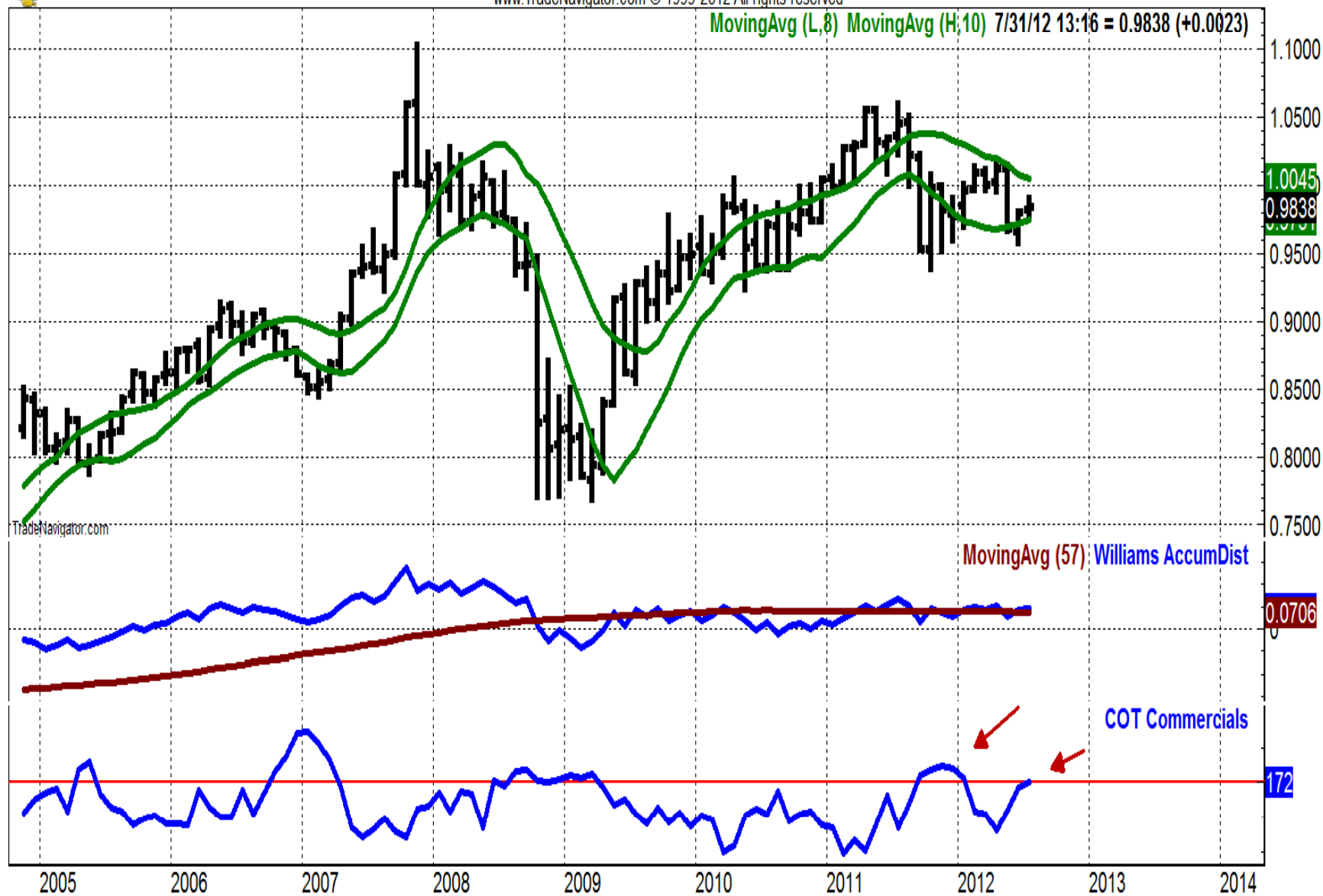
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G6C-055: Canadian \$ (Elec) Cont 1st (Monthly bars)

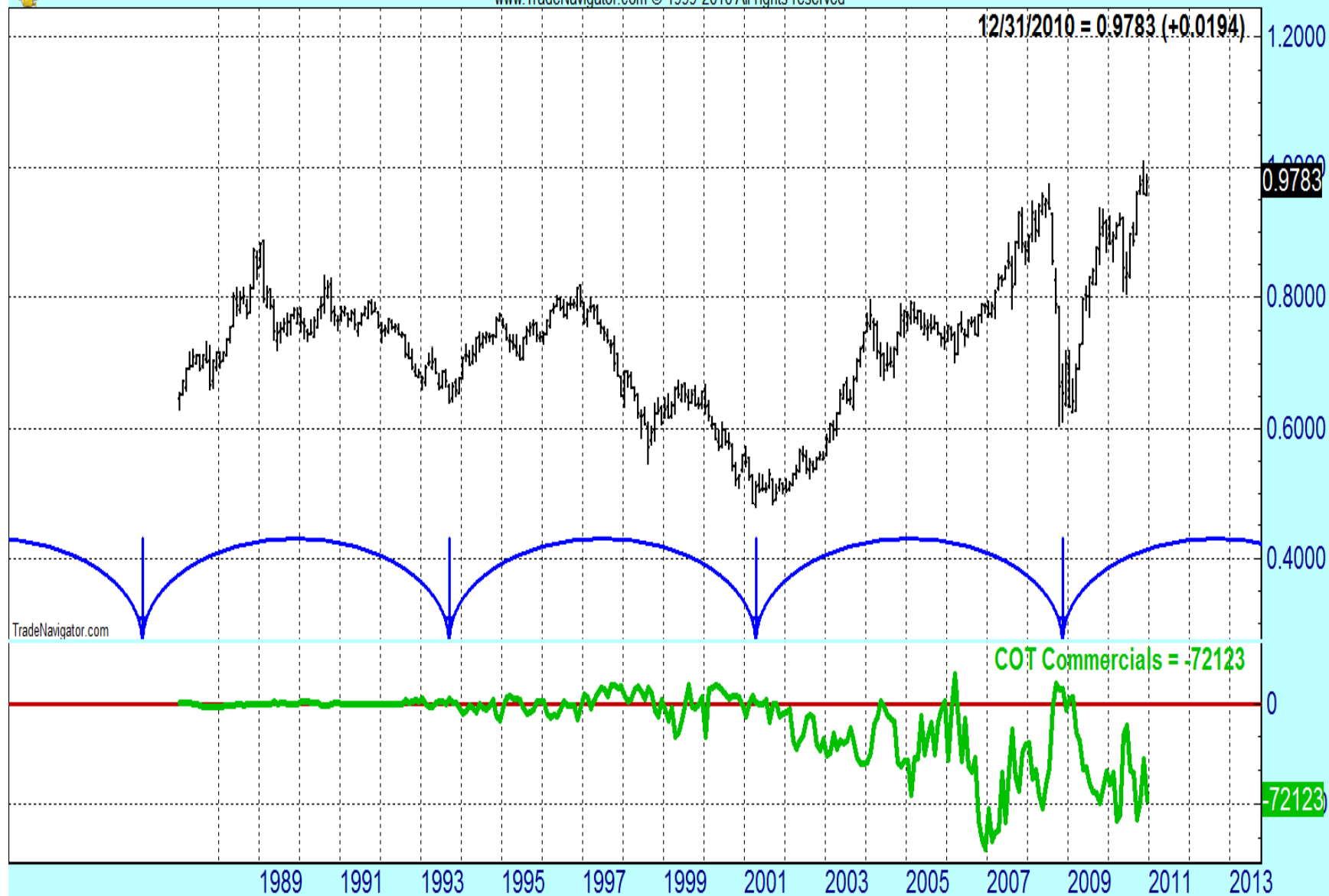
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AD-055: Australian \$ (Pit) Cont 1st (Monthly bars)

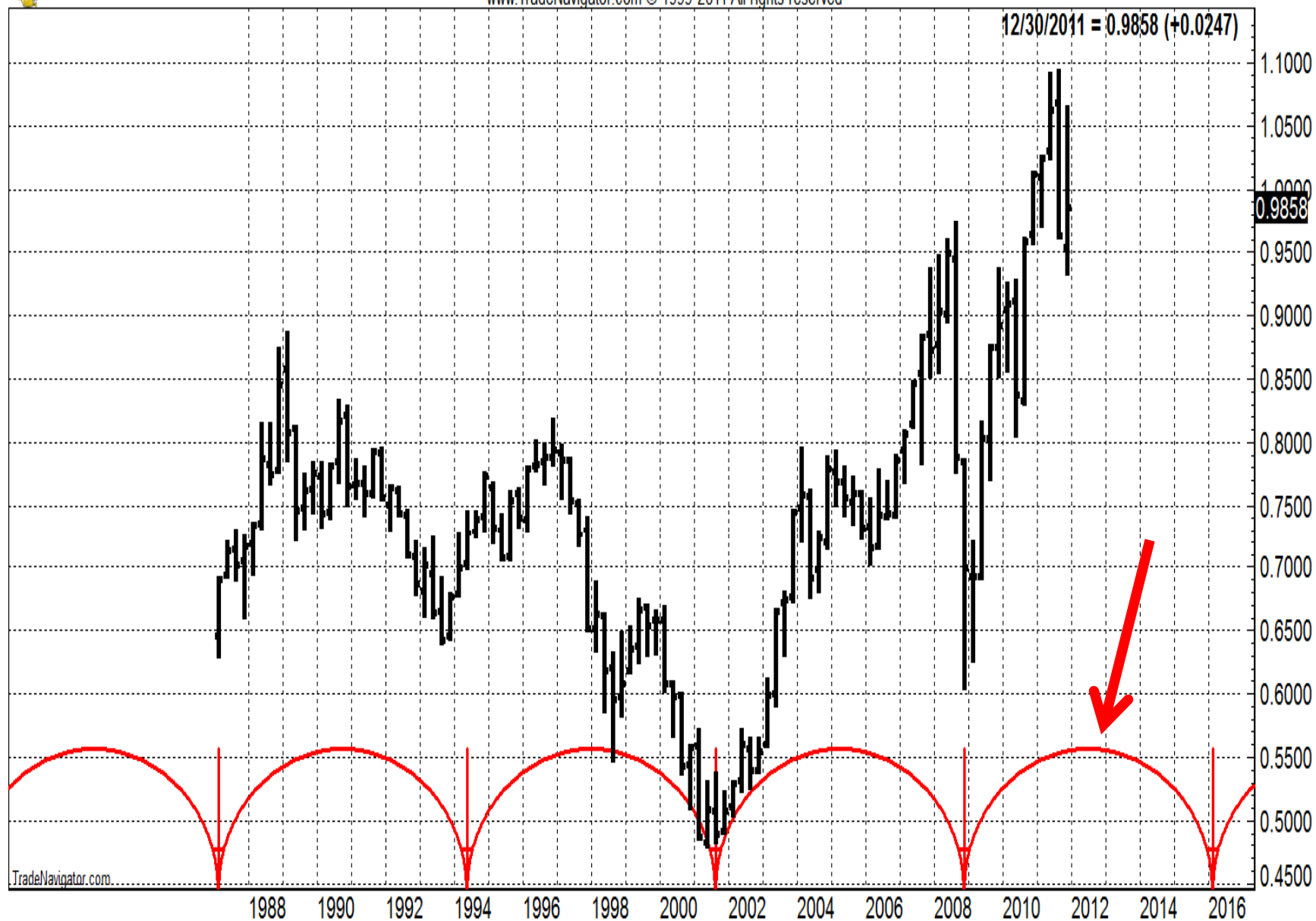
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AD-055: Australian \$ (Pit) Cont 1st (Quarterly bars)

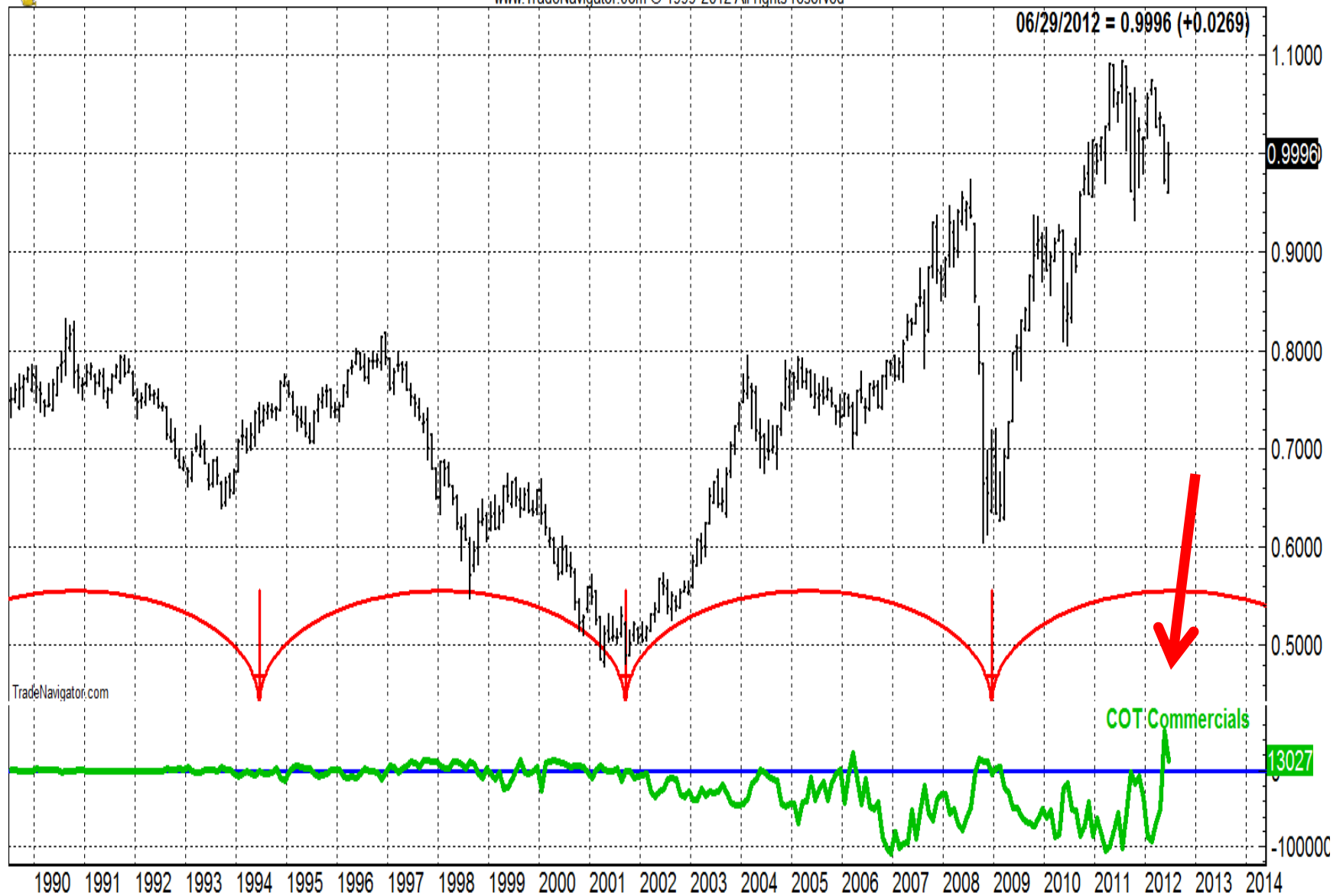
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AD-055: Australian \$ (Pit) Cont 1st (Monthly bars)

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G6A-055: Australian \$ (Elec) Cont 1st (Daily bars)

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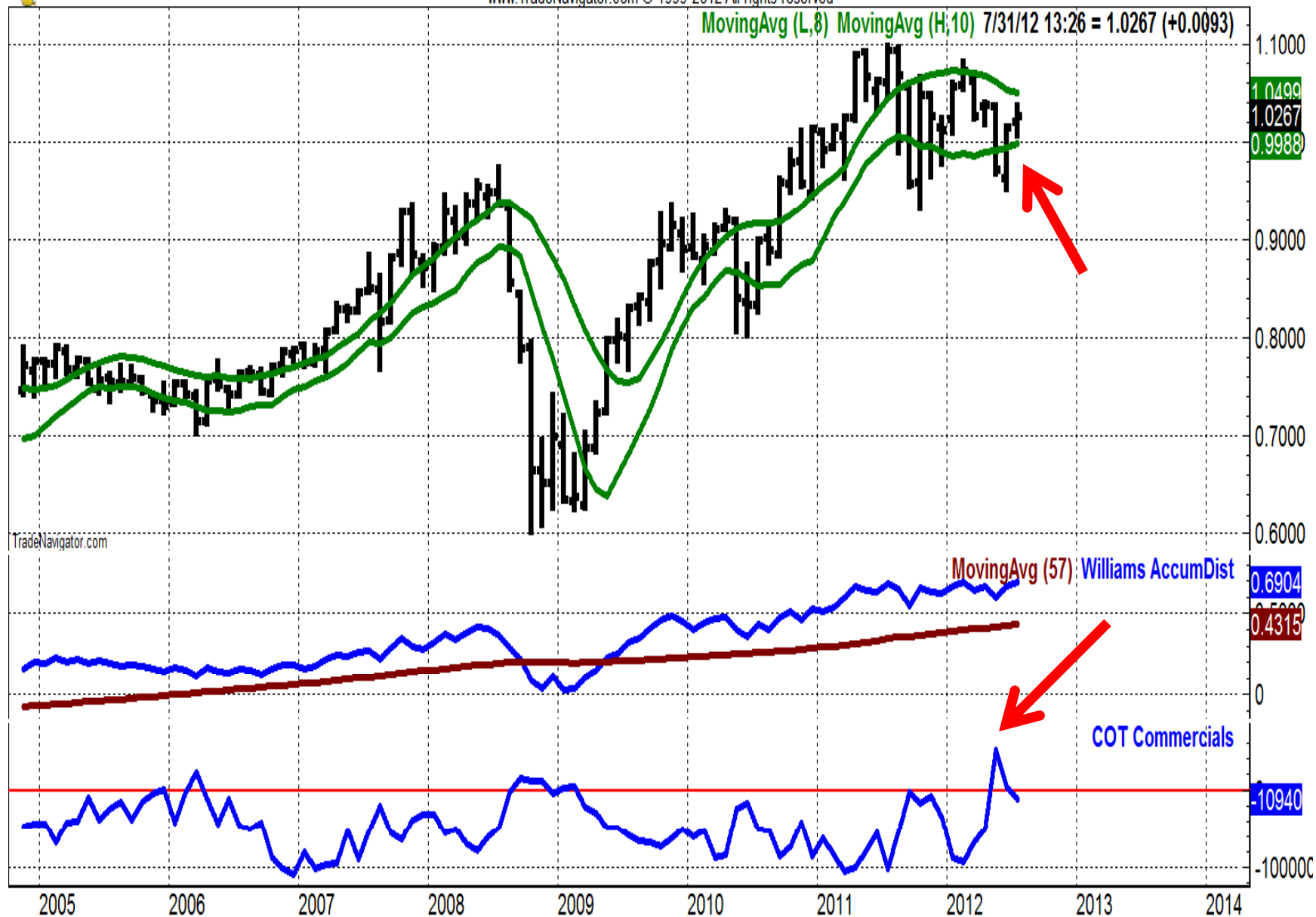
MovingAvg (L,8) MovingAvg (H,10) Jake 2 below Channel Jake 2 above Channel 6/24/12 15:34 = 0.996 (-0.003)





G6A-055: Australian \$ (Elec) Cont 1st (Monthly bars)

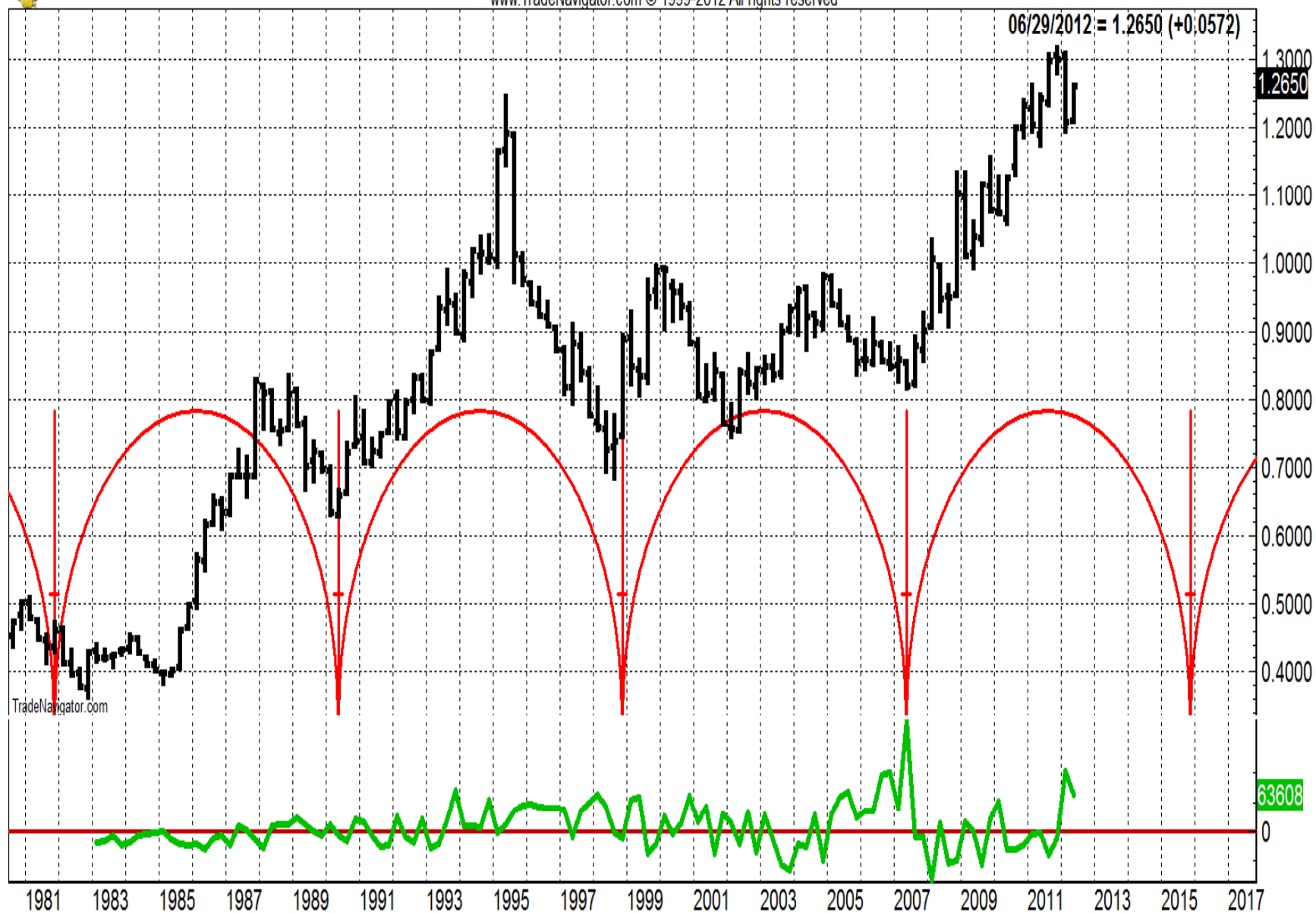
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JY-055: Japanese Yen (Pit) Cont 1st (Quarterly bars)

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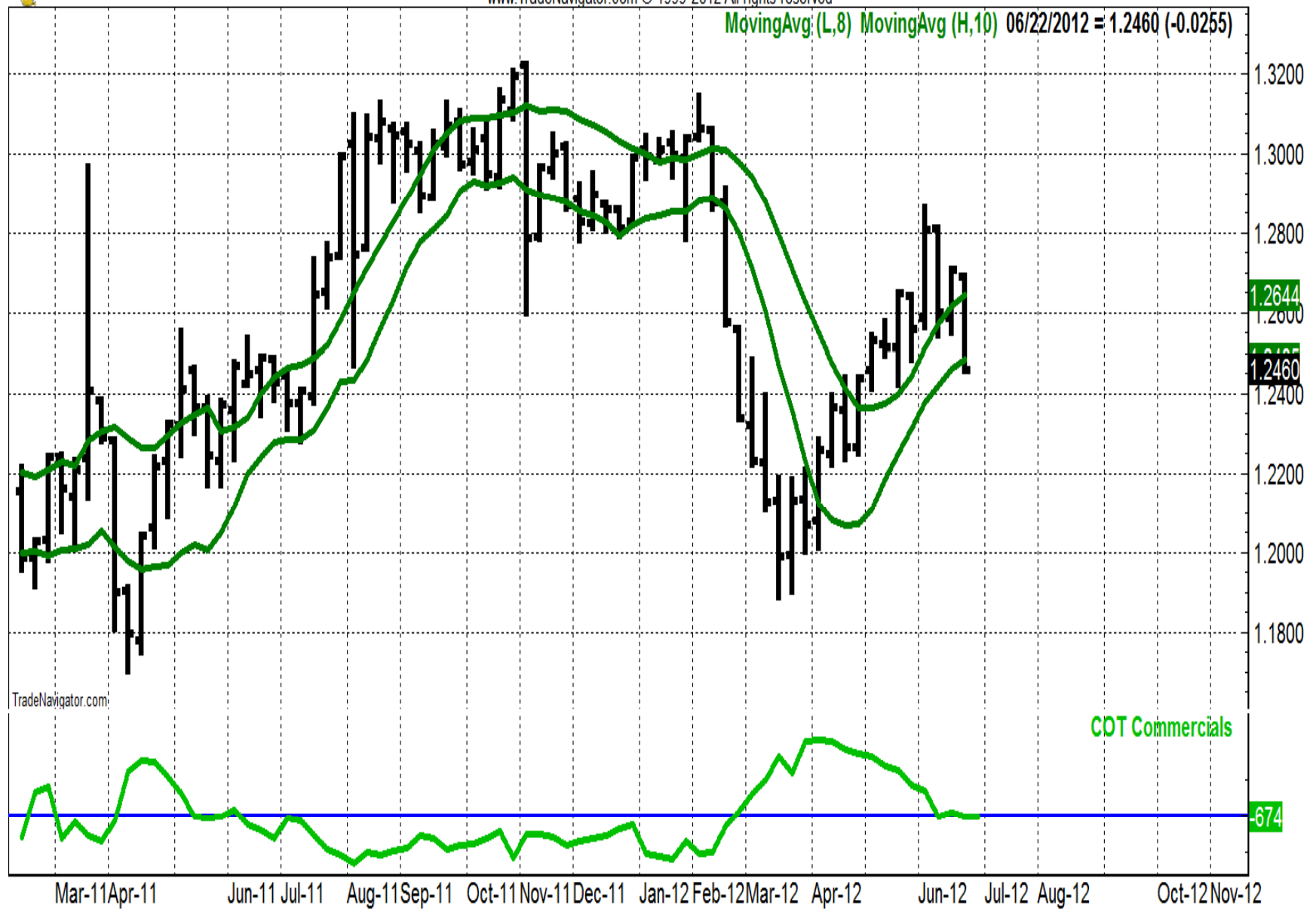




JY-099: Japanese Yen (Pit) Cash (Weekly bars)

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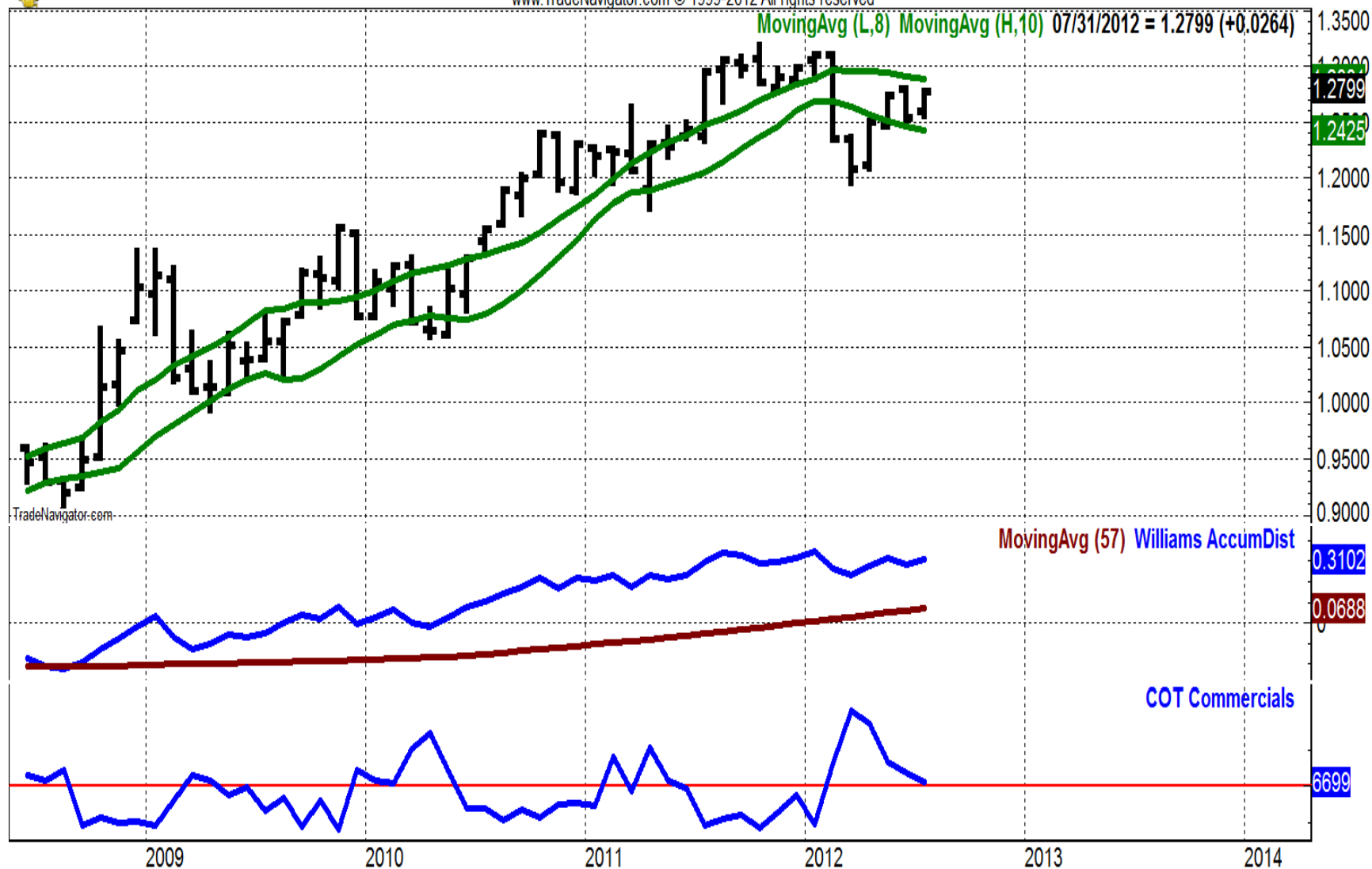
MovingAvg: (L,8) MovingAvg: (H,10) 06/22/2012 = 1.2460 (-0.0255)





JY-055: Japanese Yen (Pit) Cont 1st (Monthly bars)

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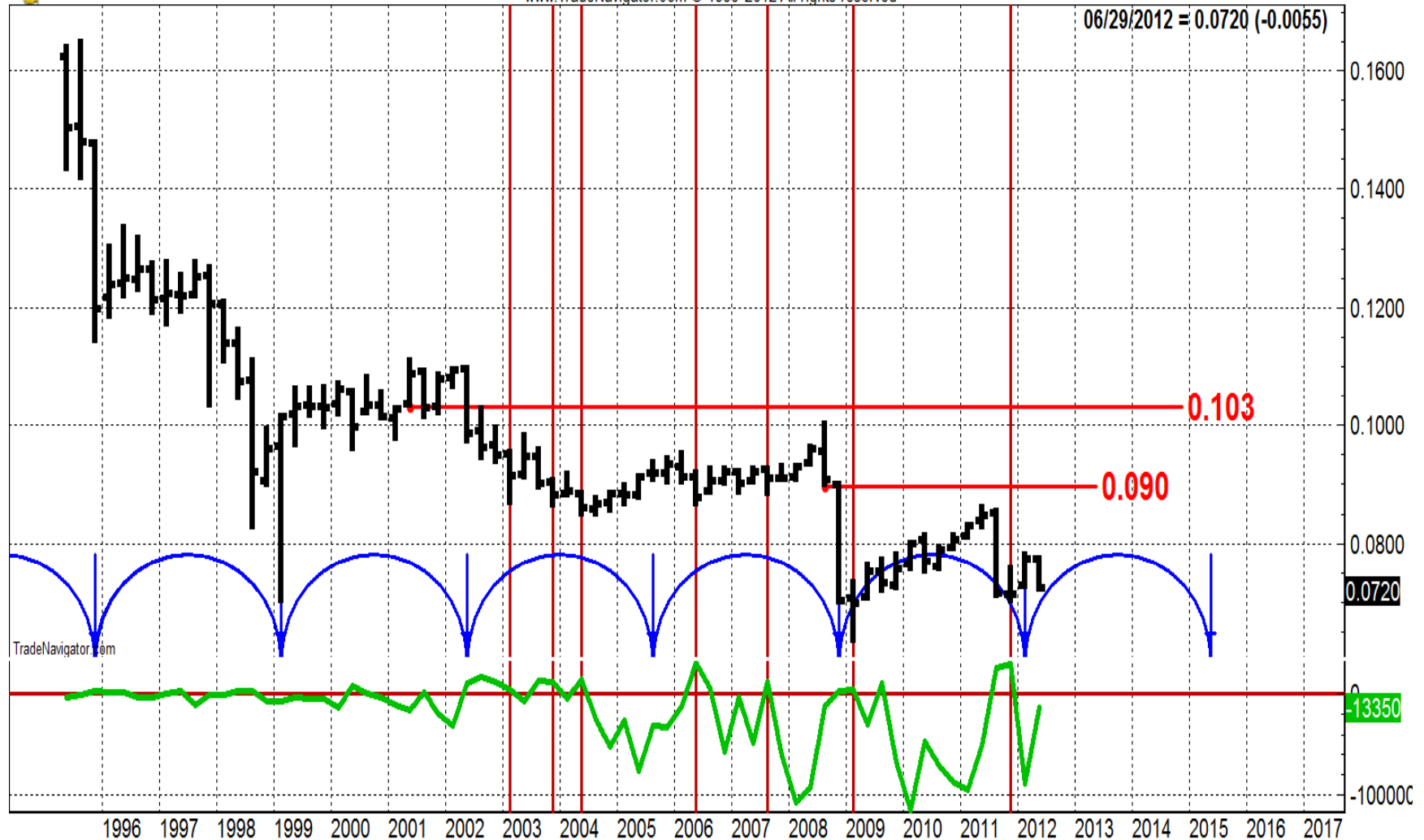


Mexican Peso



MP-055: Mexican Peso (Pit) Cont 1st (Quarterly bars)

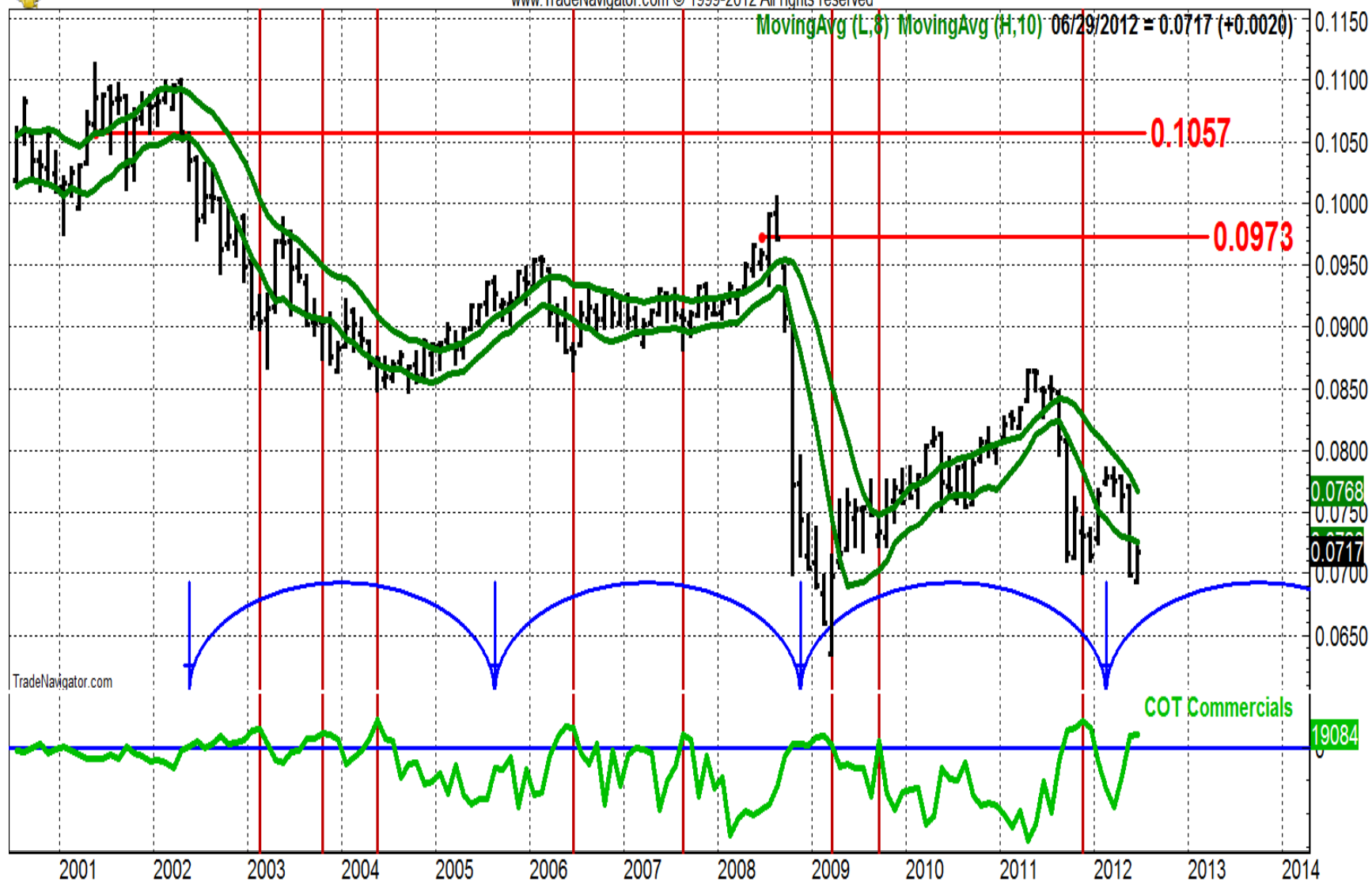
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MP-055: Mexican Peso (Pit) Cont 1st (Monthly bars)

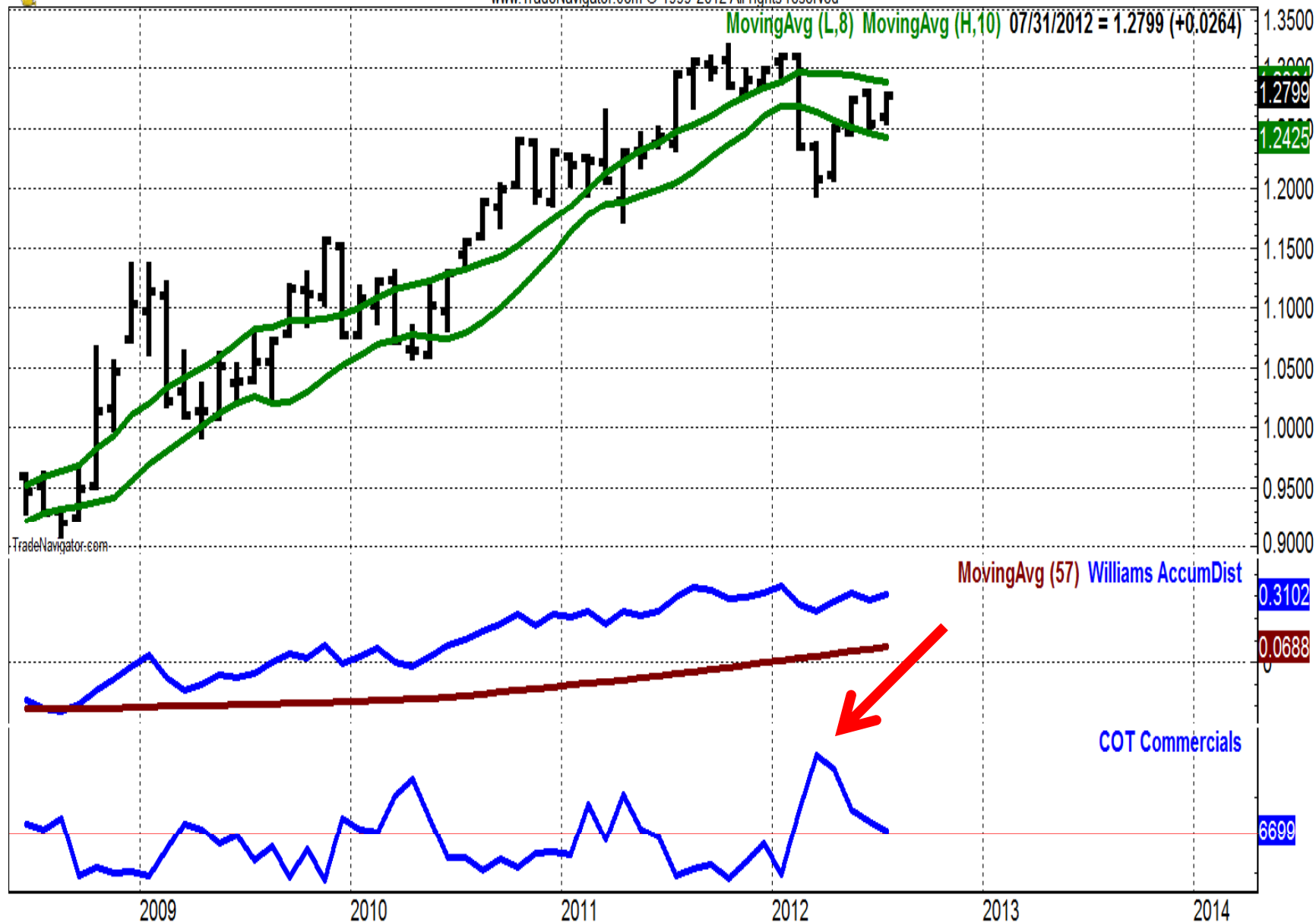
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JY-055: Japanese Yen (Pit) Cont 1st (Monthly bars)

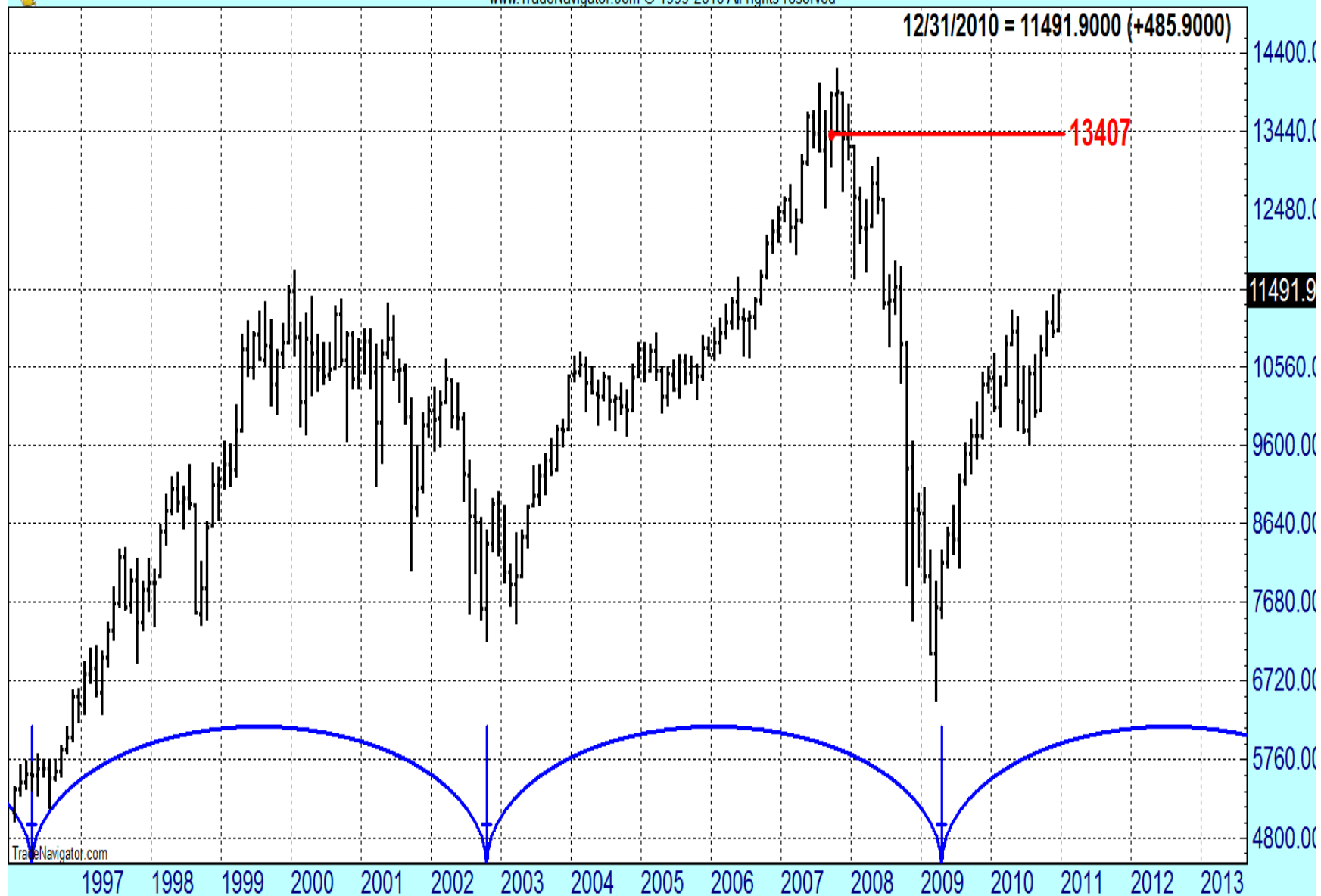
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\$DJIA: Dow Jones Industrials Index (Monthly bars)

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\$DJIA: Dow Jones Industrials Index (Quarterly bars)

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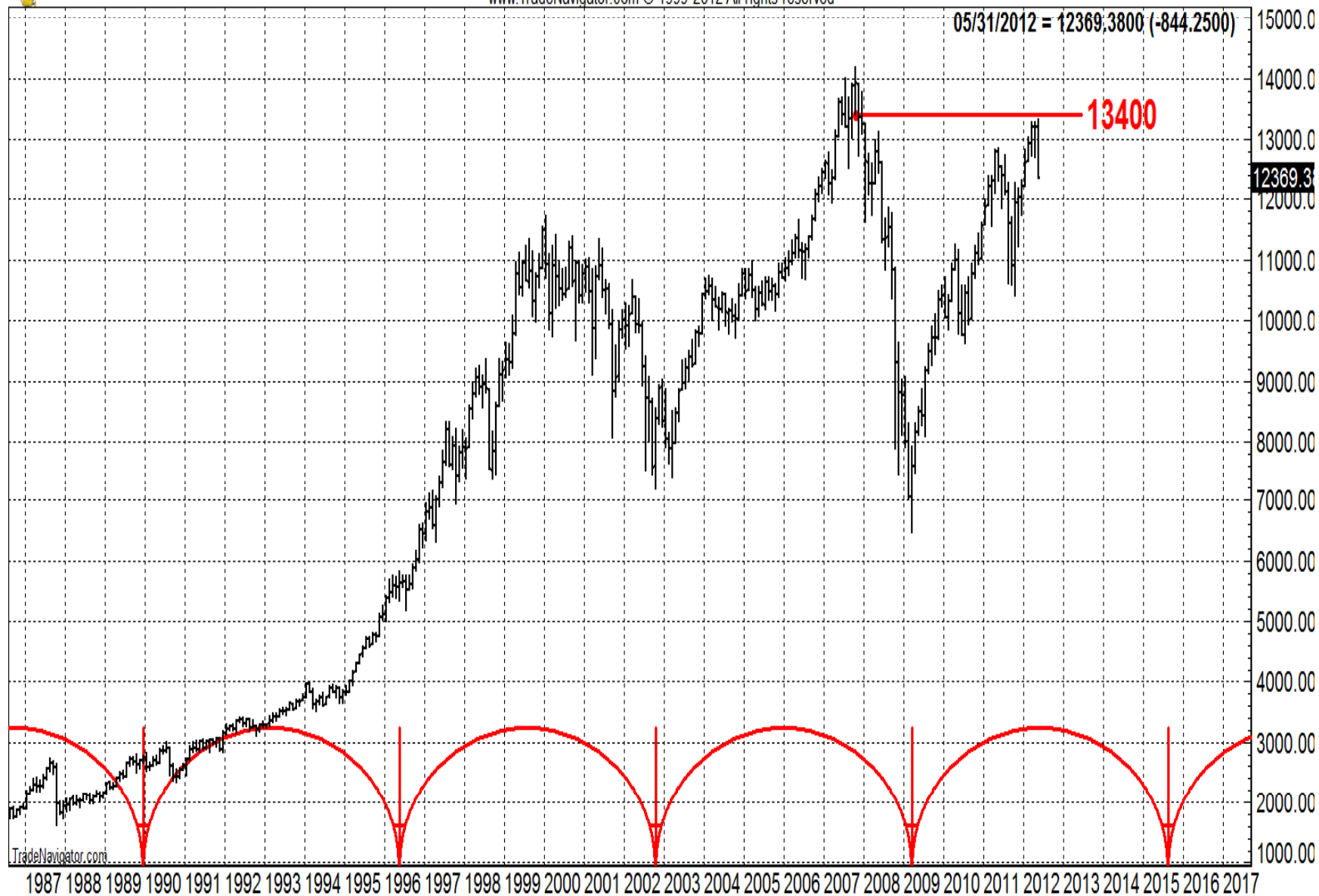
12/31/1947 = 181.20 (+3.70)





\$DJIA: Dow Jones Industrials Index (Monthly bars)

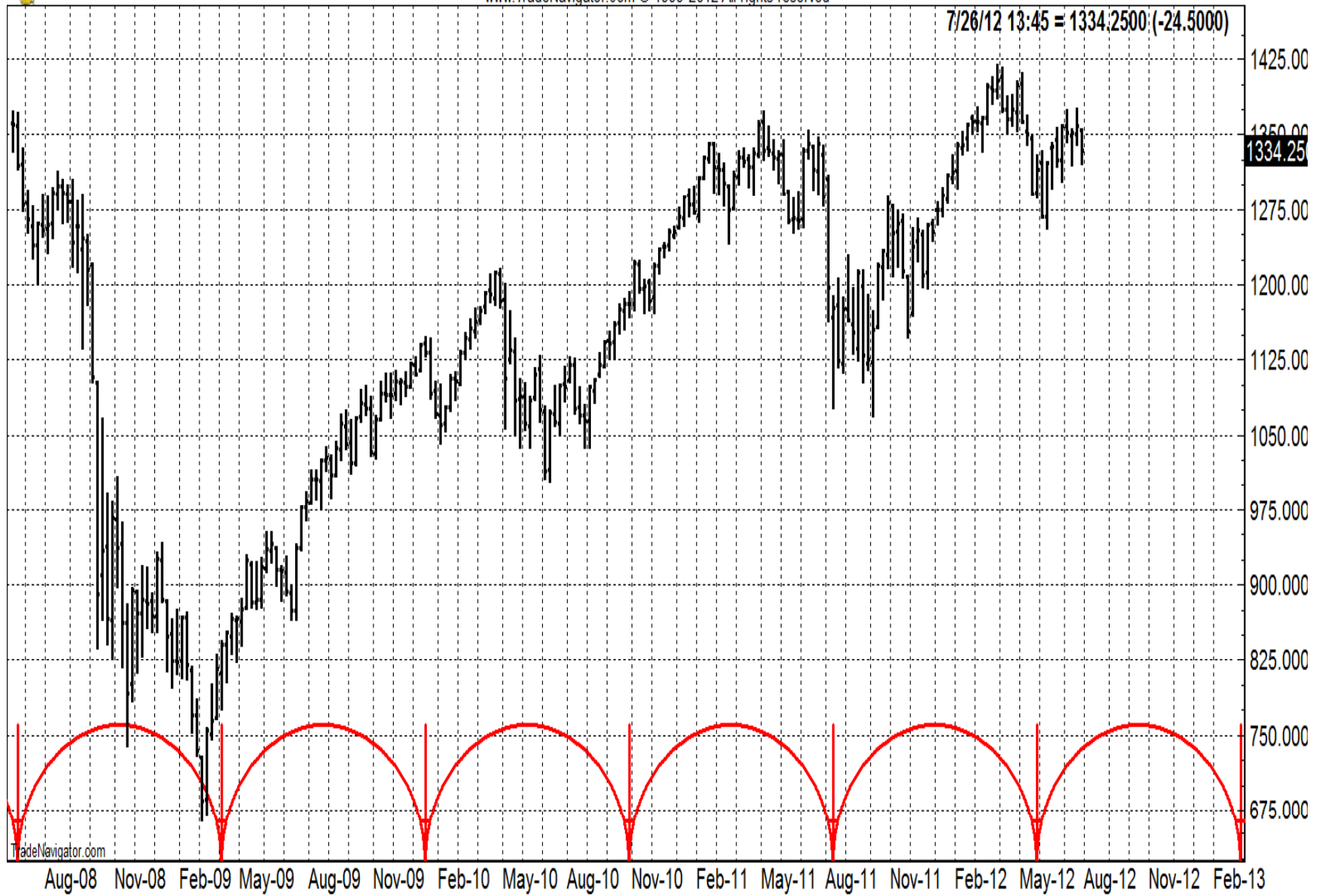
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ES-055: E-Mini S&P 500 Cont 1st (Weekly bars)

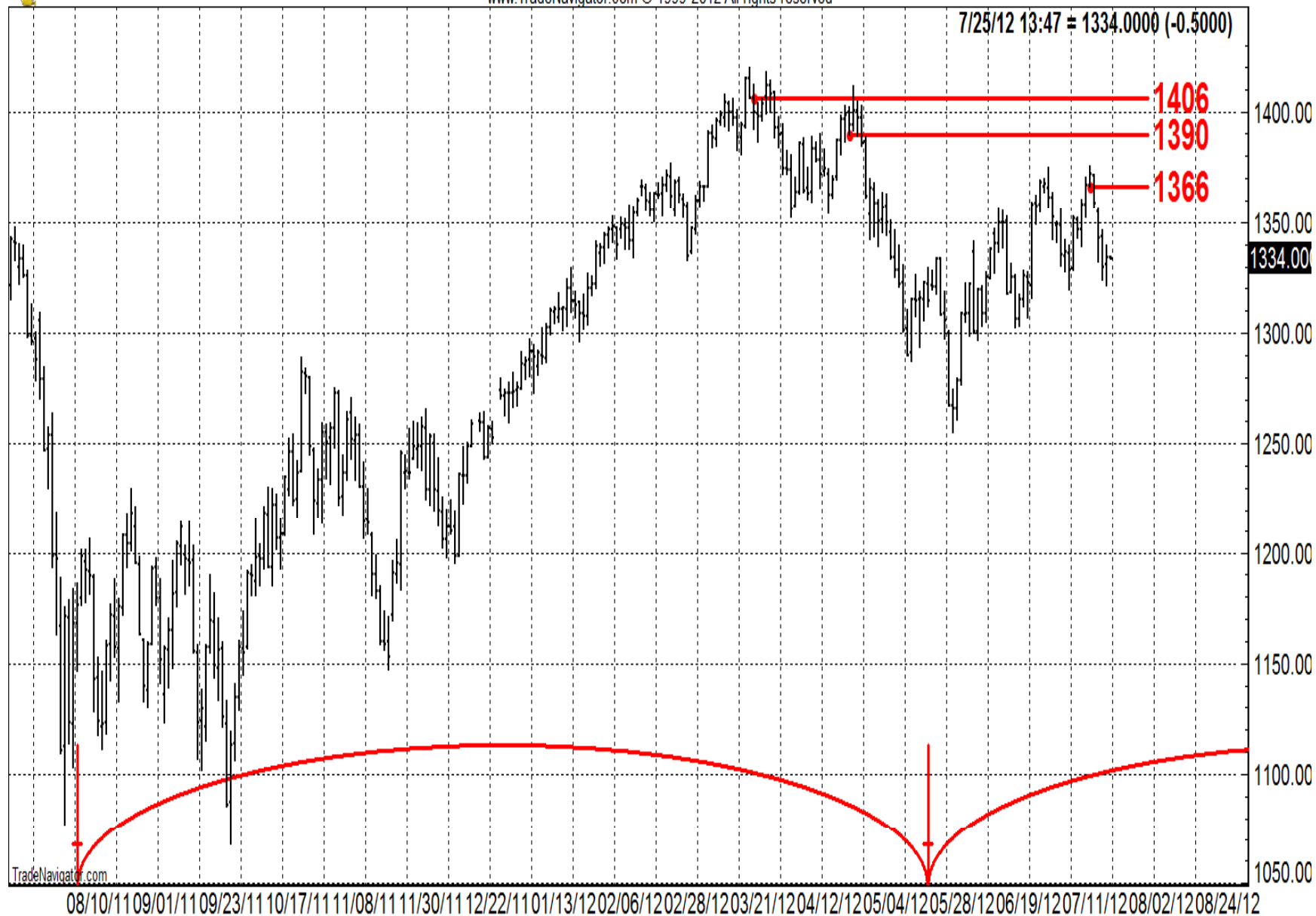
www.TradeNavigator.com © 1999-2012 All rights reserved



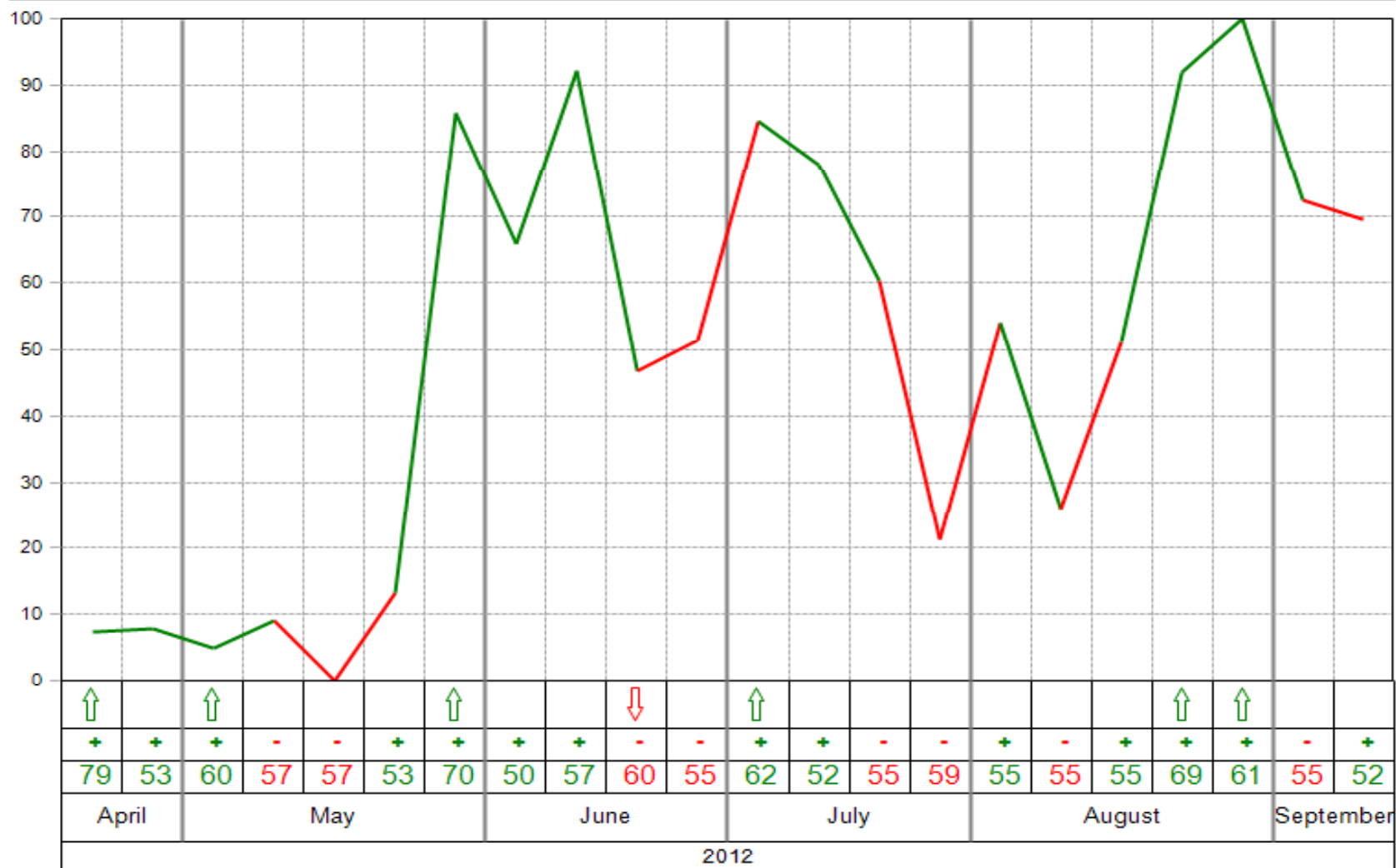


ES-055: E-Mini S&P 500 Cont 1st (Daily bars)

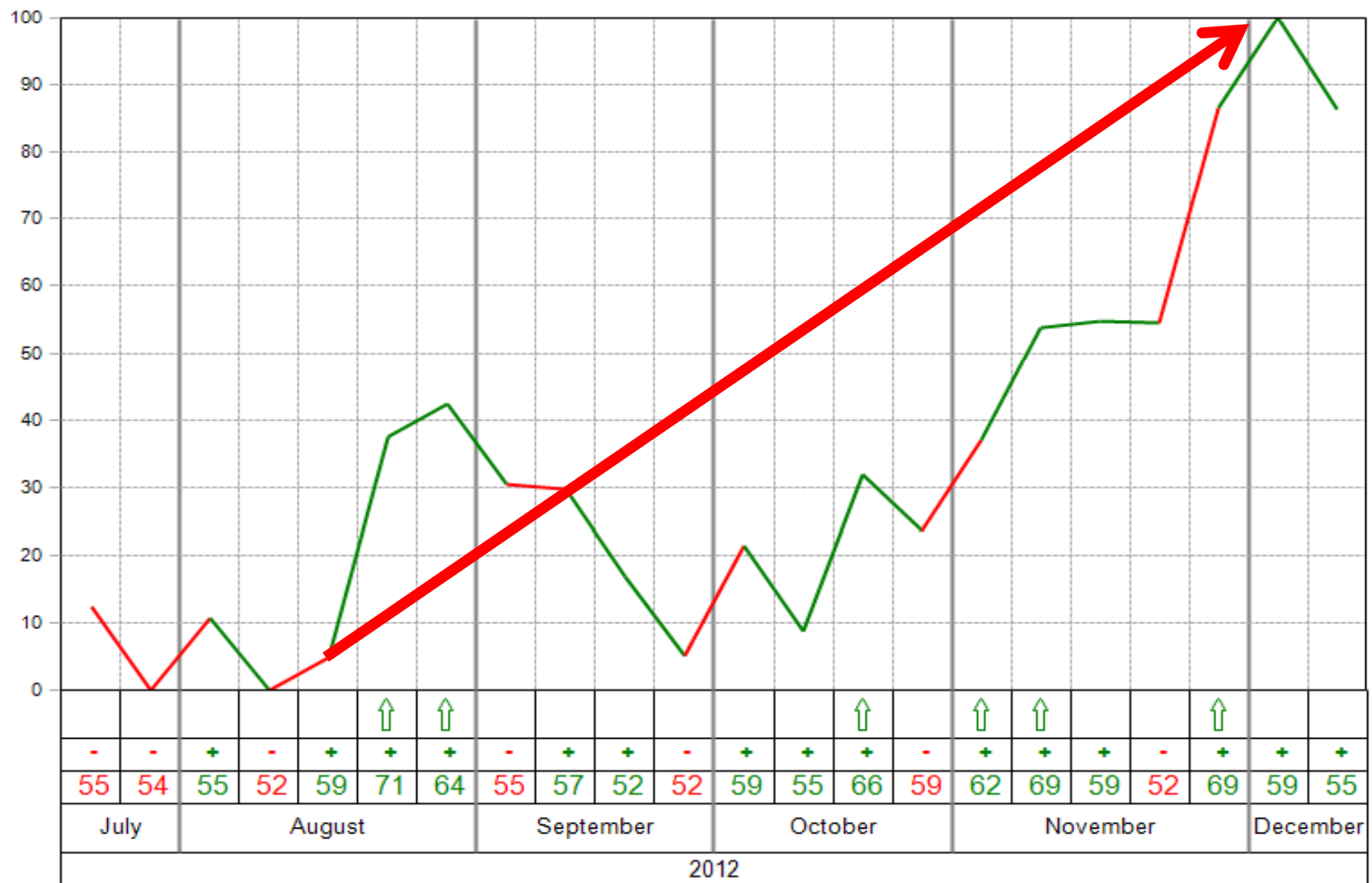
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WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : September - SP 500 1983 - 2012



WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - SP 500 1983 - 2012



Conclusions

- Inflation imminent
- Commodity rallies have started
- Record highs expected – some already made
- Still plenty of time to get on board
- 1-2 year bull trends minimum expectation
- BUY and HOLD inflation sensitive assets

- Mentoring appointment interview
- <http://www.comtrade1.com/letter/>
- Webinar was recorded

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- Email me if you have questions:
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- Best of trading
- **Jake Bernstein**