

Jake Bernstein

Trading Webinar

www.jakebernstein.com

Metals Explosion?

What's ahead for the metals?

What the Indicators are Telling me now and

What to do right now

Wednesday 8 August 2012

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800-678-5253 * 831-430-0600

What to do now

- BUY gold, silver, platinum and/or palladium now or at support for a seasonal move. Some markets have already triggered
- Alternative: buy coins or ingots
- Can wait for specific seasonals as shown
- Gold NO LONGER preferred over silver
- Platinum preferred over gold
- Palladium preferred over all
- Gold should make all time high by mid 2013
- Minimum target 2012 is 1800 (conservative)

WHAT I WILL DISCUSS TODAY

- Why I believe that a precious metals EXPLOSION is imminent and may be only days from starting
- THE TECHNICAL EVIDENCE
- Copper: THE NEXT BIG UPMOVE
- BUY COPPER STOCKS?
- I want to show you a fantastic gold seasonal trigger!
- Timing the moves - precisely
- BEST PICKS: Gold, Silver, Platinum, Palladium
- Trading the precious metals ratios: which ones are the best "bang for the buck"
- Rare earth metals and strategic metals: STOCKS and ETFs with timing

- What I own and what I have been buying and how and where
- 4 stocks to watch and own
- I have been bullish on gold for over 8 years - if you missed the last two dozen opportunities what can you do now? Are you too late?
- Bullion, coins, numismatics - my suggestions
- EXACT SEASONAL TRADES - start date, end date, odds, risks and rewards

Background and WHY now?

- Based on my market work I have been bullish on precious metals for over a decade and I have been correct
- International economic mismanagement has created a backdrop of uncertainty at least and a situation that will likely lead to inflation at worst
- Energy prices are poised to move higher
- Interest rates are bottoming (50-60 year cycle)
- ***We now enter a seasonal time frame that has, in the past, been the most bullish time of the year***
- My trend and cycle indicators remain bullish thru 2013
- There are significant ratio situations now developing
- Commercial activity: copper suggests new all time highs

“We are now on the threshold of what may be the biggest, most dynamic, most volatile and most dramatic blowoff top in the history of gold and other metals...be prepared and enjoy the wild ride...protect yourself by holding at least 20% of your assets in gold and other precious metals...and don't be too quick to get out lest you leave too much money on the table and lose your protective asset”

Structure: how we will do it

- **I will examine AND UPDATE YOU ON all major metals markets on the basis of various 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
 - 6. My time line
 - 7. Current or developing timing triggers
 - 8. Expectations and recommendations
 - 9. Factors unique to particular markets (palladium)

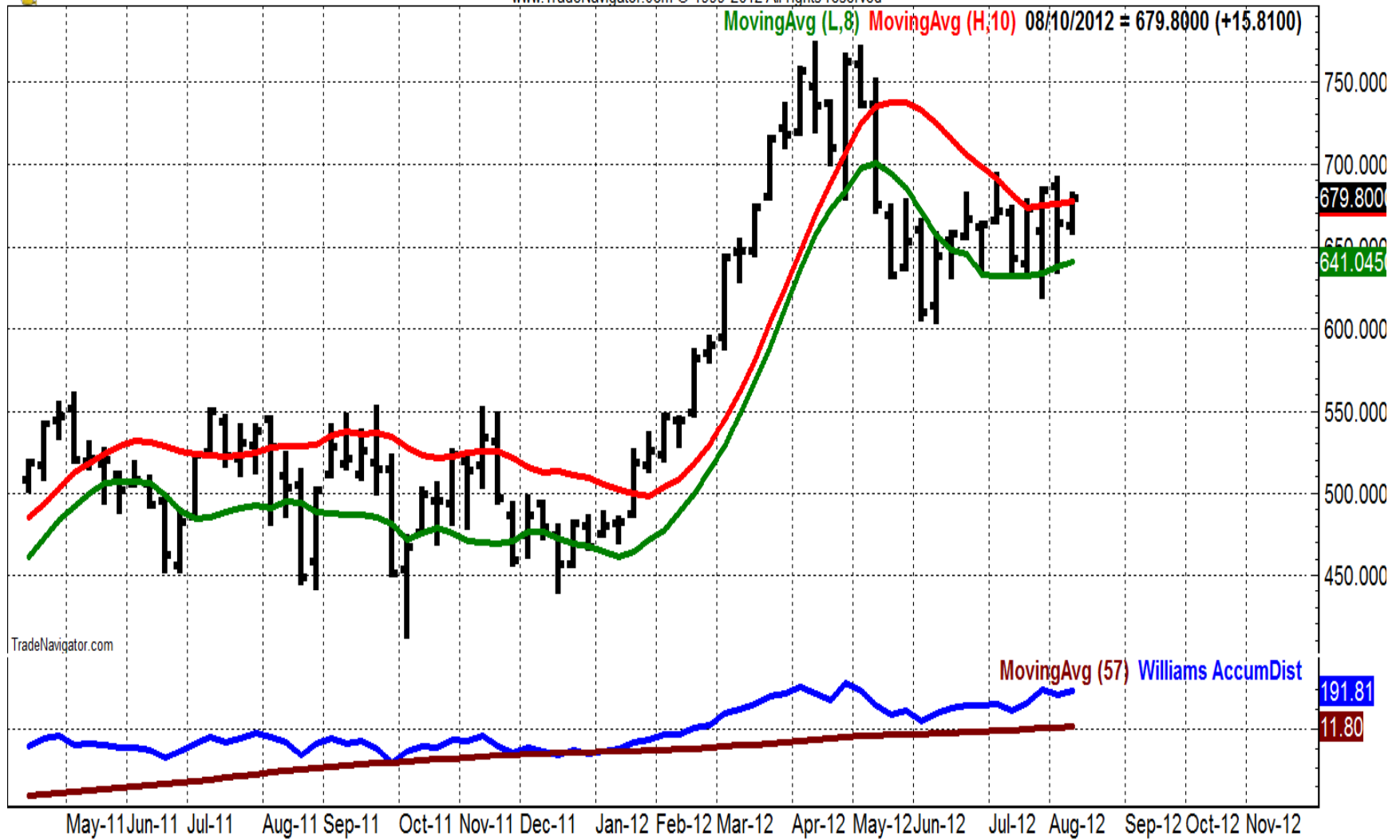
- The economic trend has bottomed but at what cost?
- Fiat money
- Definition of inflation: more \$ chasing fewer goods...think about that – smaller crops due to weather; smaller supplies due to hoarding – what has prompted hoarding...the low cost of money
- The “perfect storm”
- What to do and what to own?
- PCLN the antithesis of what to own now
- Electronic trading will exacerbate the moves

PCLN yesterday



PCLN: priceline.com Incorporated (Weekly bars)

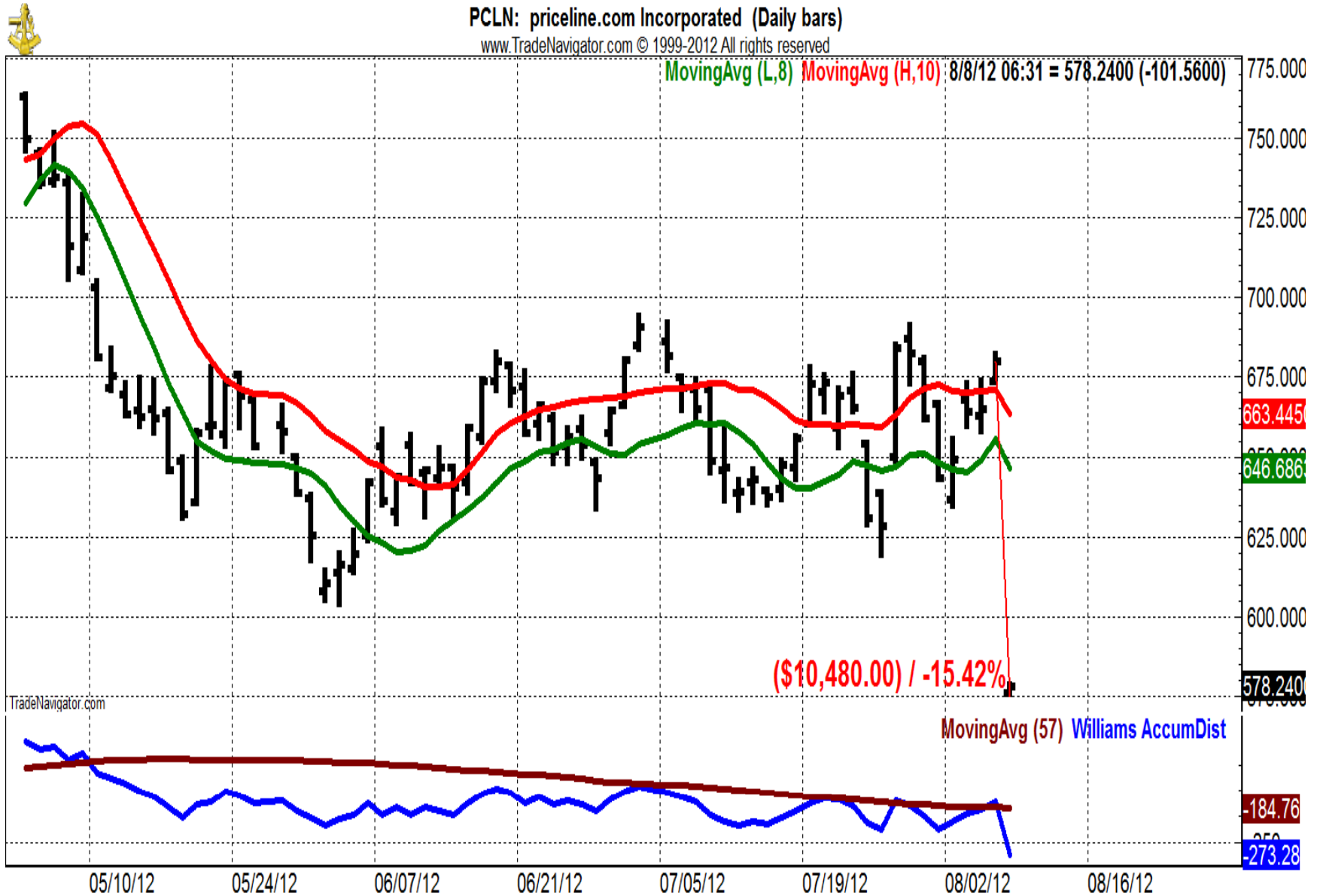
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PCLN today -101

PCLN: priceline.com Incorporated (Daily bars)

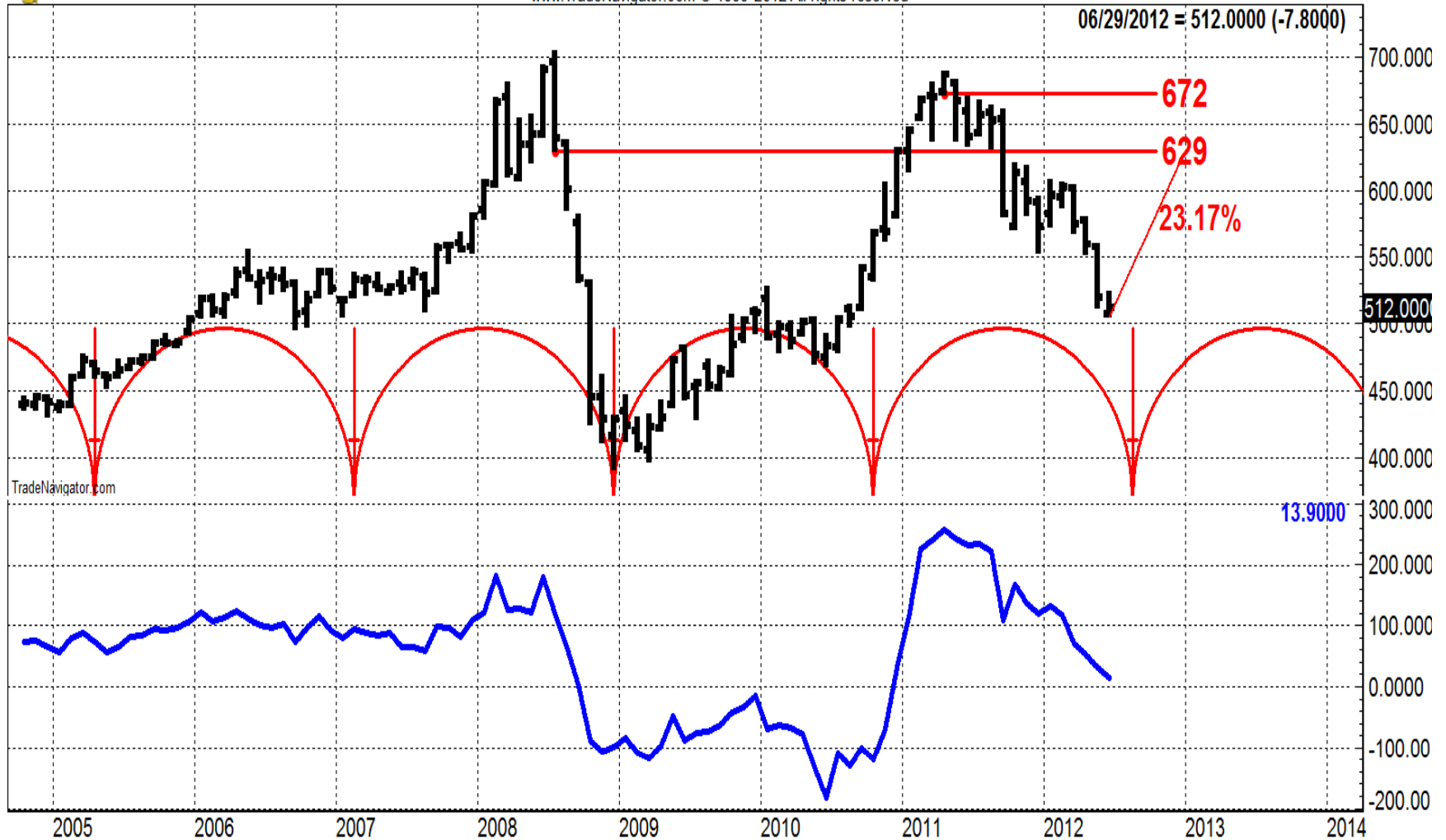
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23%+ gain likely CRB 6/29



CR-067: Crb Index Cadj Liq (Monthly bars)
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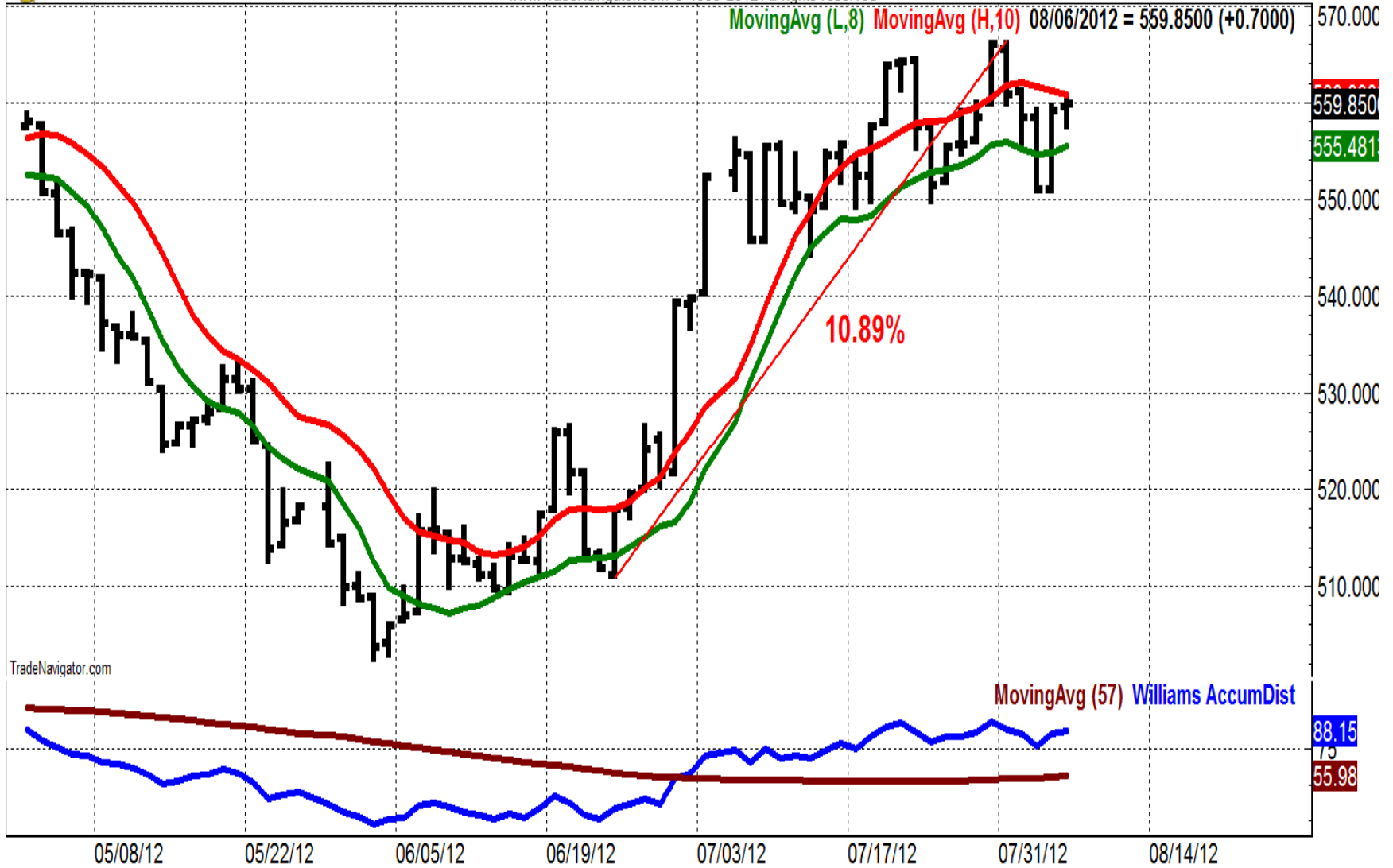


CRB now



CR-099: Crb Index Cash (Daily bars)

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CRB long term outlook

- Commodity prices have bottomed and still have a minimum of 15% higher to go – emphasis on *minimum*
- *Is there a maximum?*
- Next chart

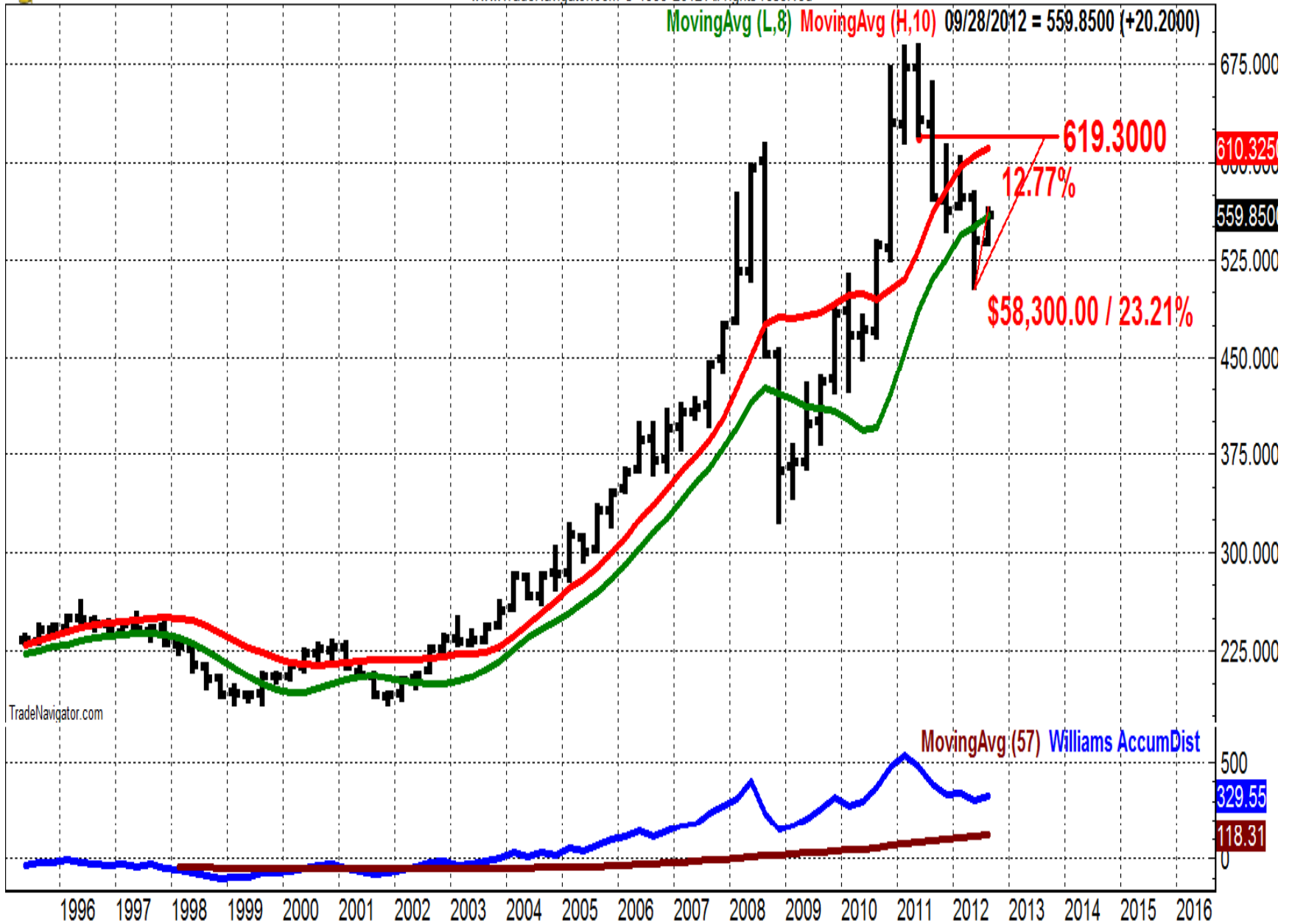
What does a 23% gain mean?

- 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!



CR-099: Crb Index Cash (Quarterly bars)

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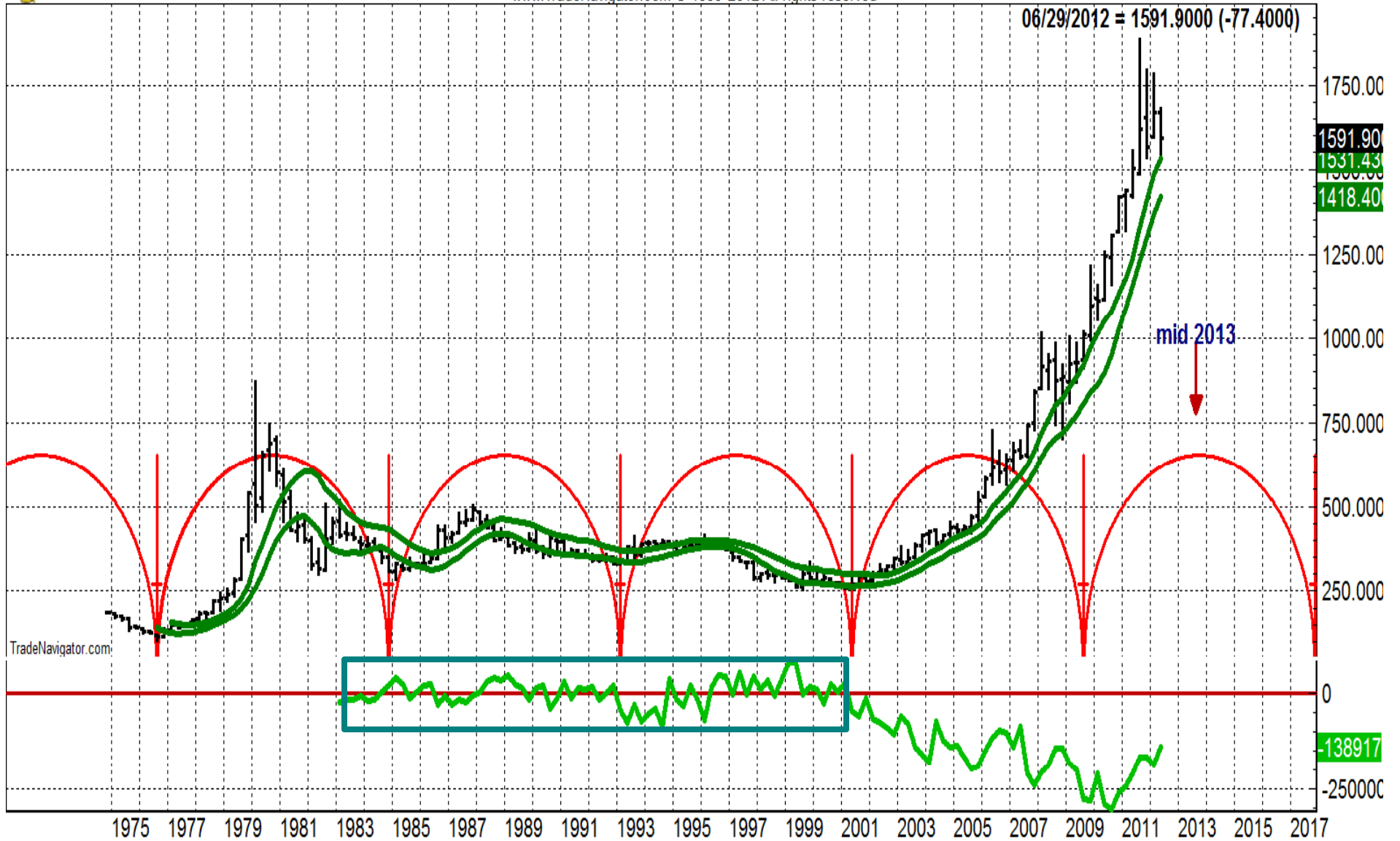


GOLD



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

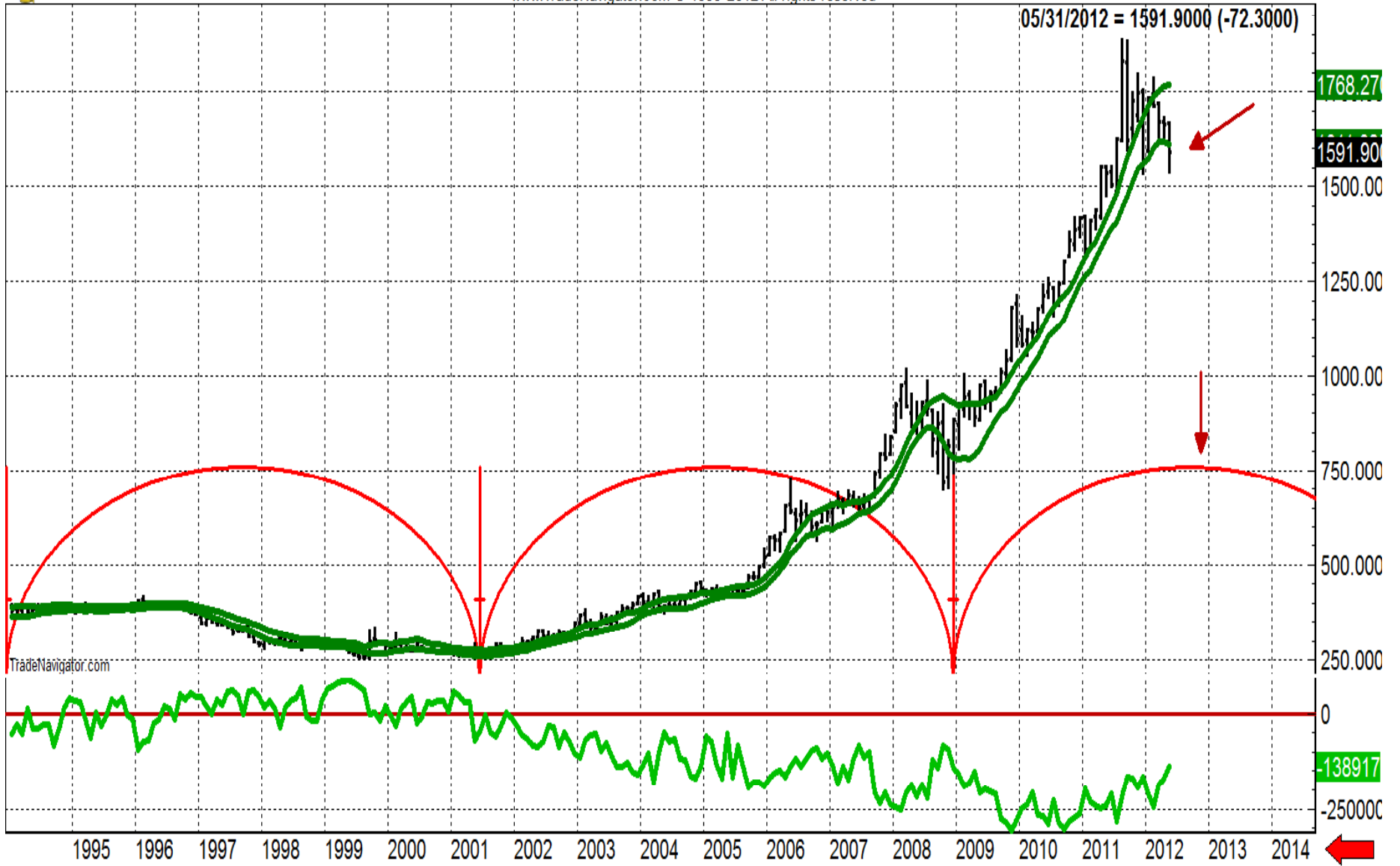
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GC-055: Gold Comex (Pit) Cont 1st (Monthly bars)

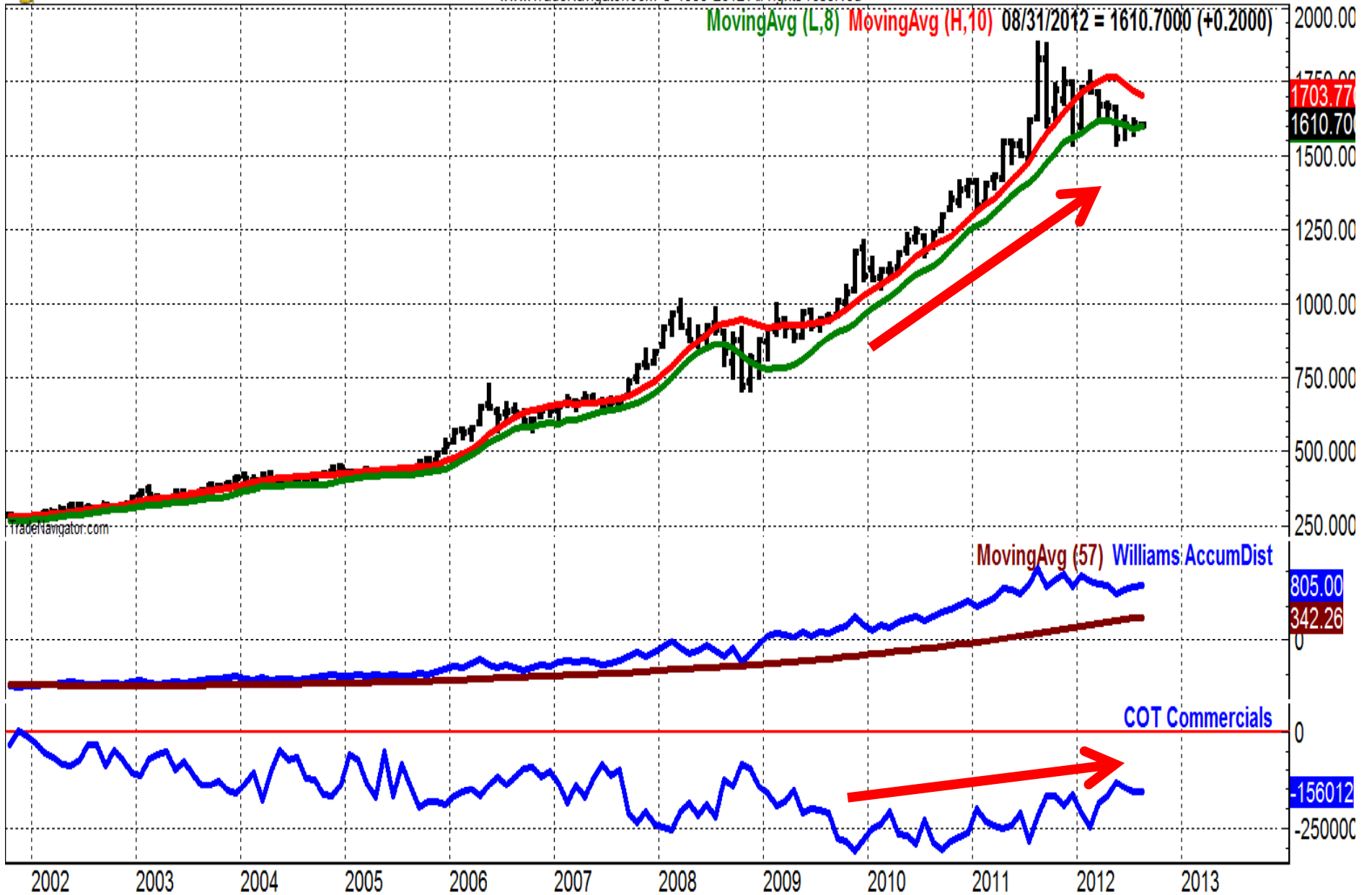
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GC-055: Gold Comex (Pit) Cont 1st (Monthly bars)

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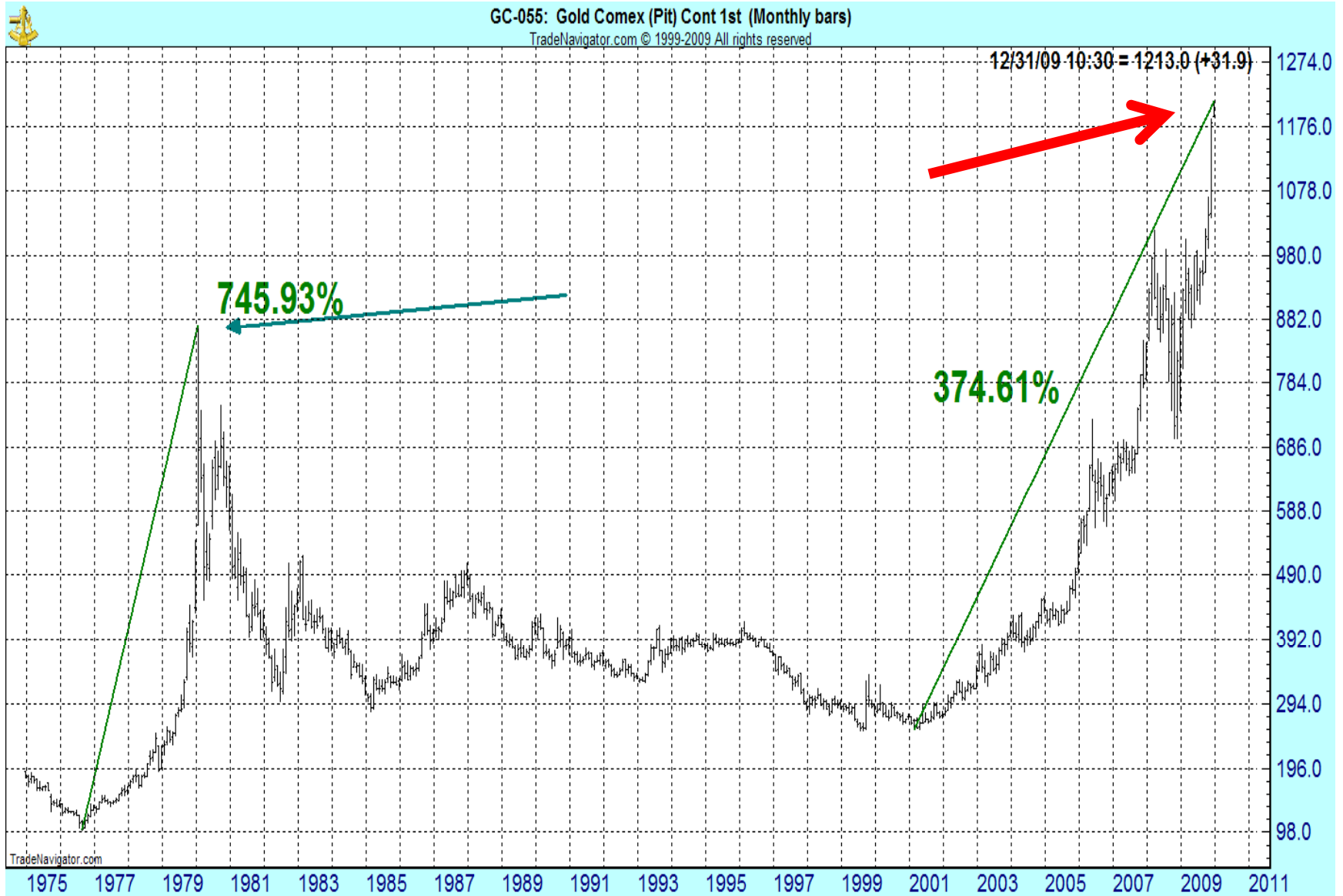
GC-055: Gold Comex (Pit) Cont 1st (Monthly bars)

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MovingAvg (L,8) MovingAvg (H,10) 08/31/2012 = 1610.7000 (+0.2000)



Gold: my 2009 forecast: still bullish only half way there



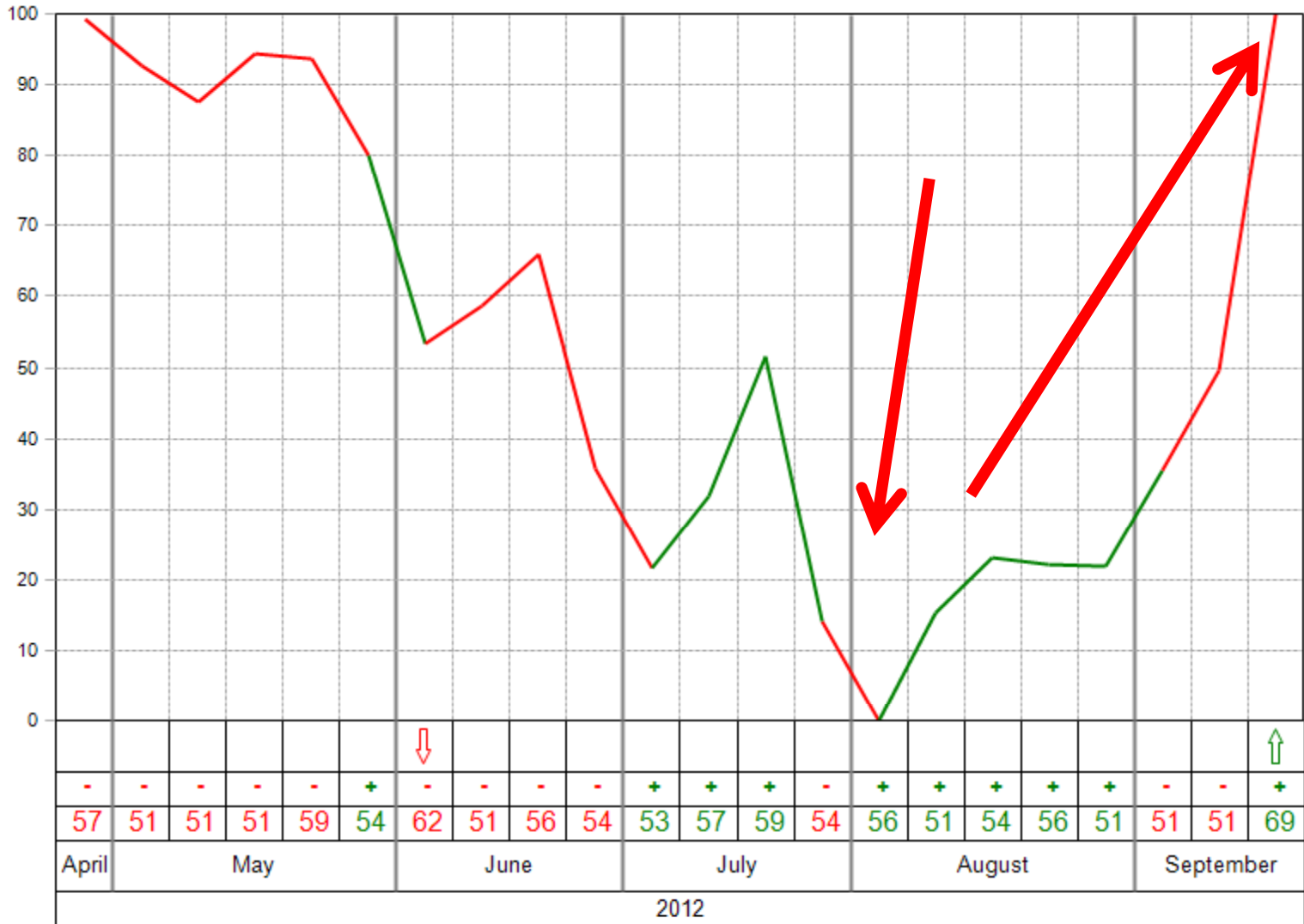
Gold 745% rally?



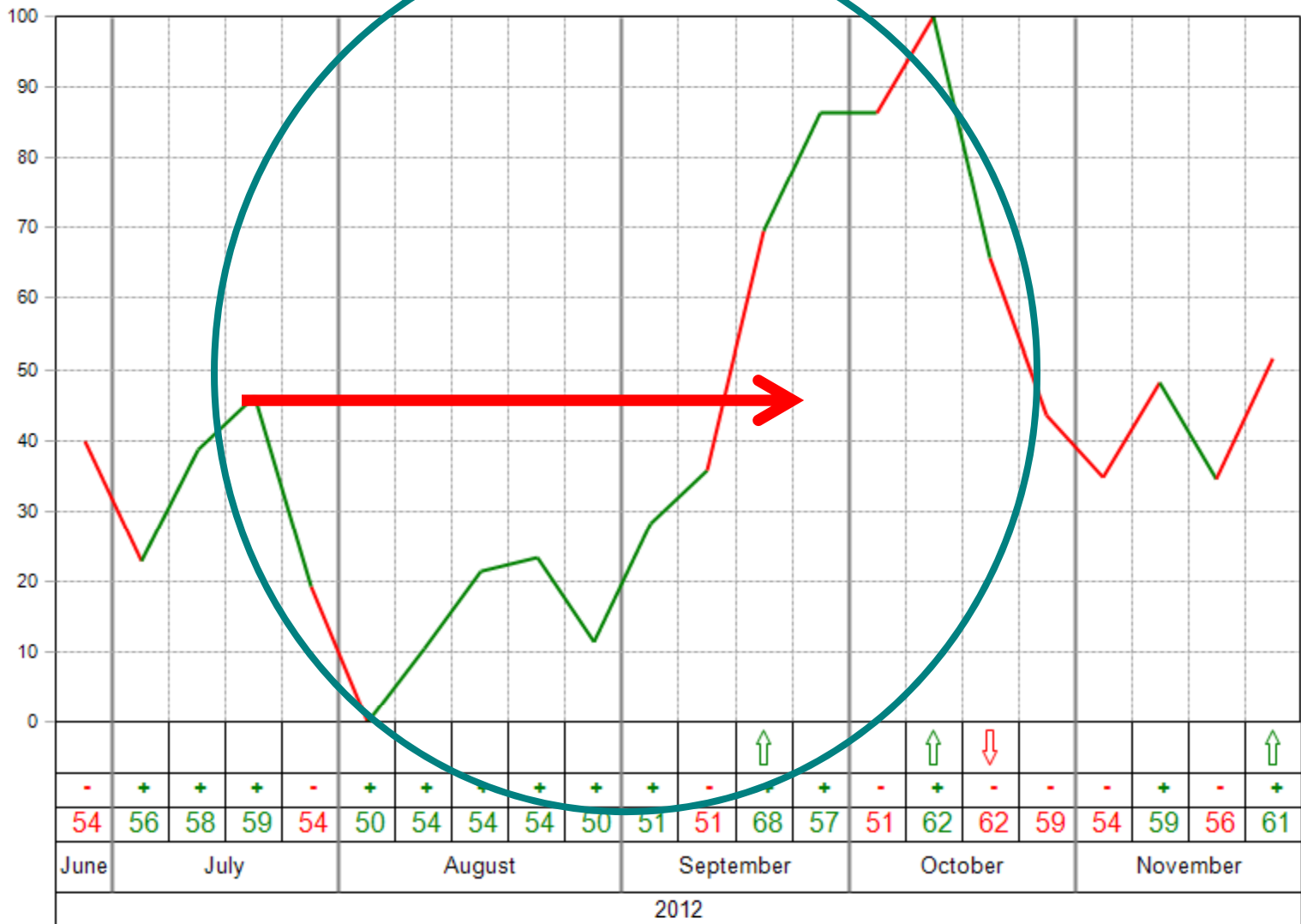
Gold: Forecast

- Bull market intact
- Buy weekly or Monthly support and/or seasonal move that's about to begin
- Upside target still \$2100 +
- Let's look at silver next
- Buy lower prices shares < \$25
- Avoid futures related ETF's
- Suggestions: NG, NGD, HL, ABX, VZG*, ASA, GOLD*, GRS, GRZ, DROOY*, GRZ*, FCX, IAG, IAU (1/10 etf). GDXJ more details later
- Avoid double or triple longs/shorts

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



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



2012

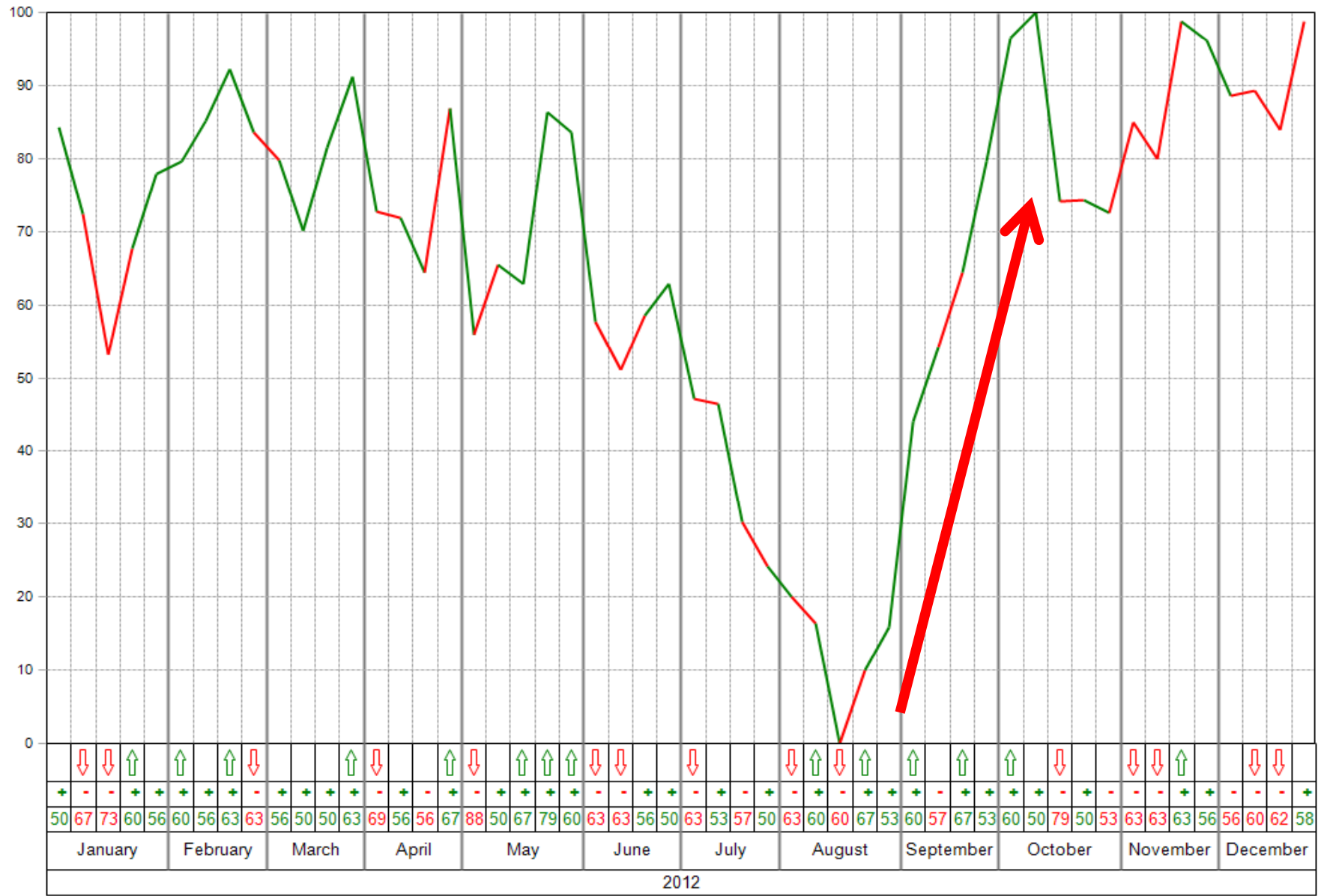


ABX: Barrick Gold Corporation (Daily bars)

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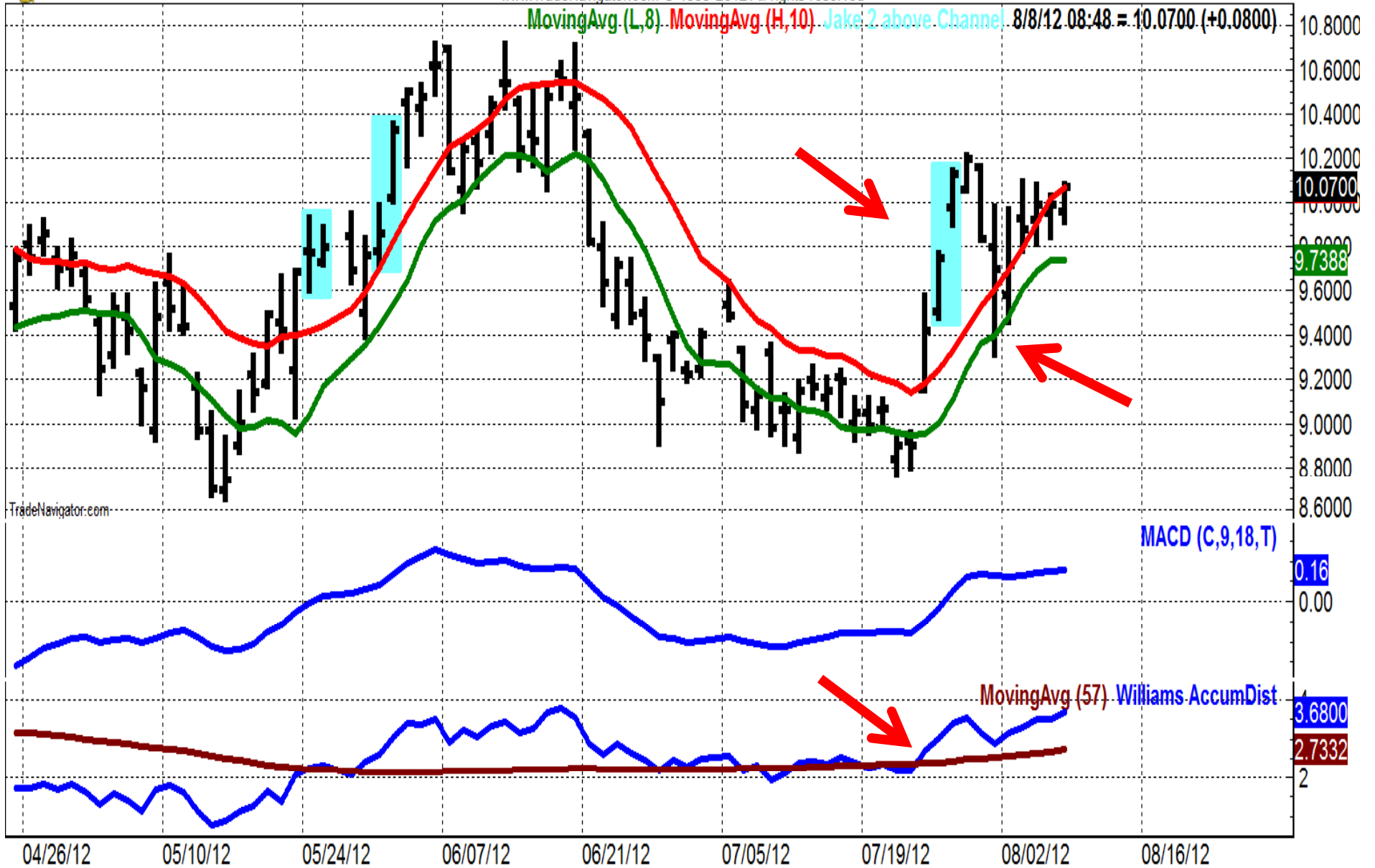
WEEKLY SEASONAL STOCK COMPOSITE Harmony Gold Mining : 1994 - 2012





HMY: Harmony Gold Mining Co. Ltd. (Daily bars)

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**THE GOLD CRITICAL MONTH
SEASONAL TIMING TRIGGER
FIRST TIME SHOWN**

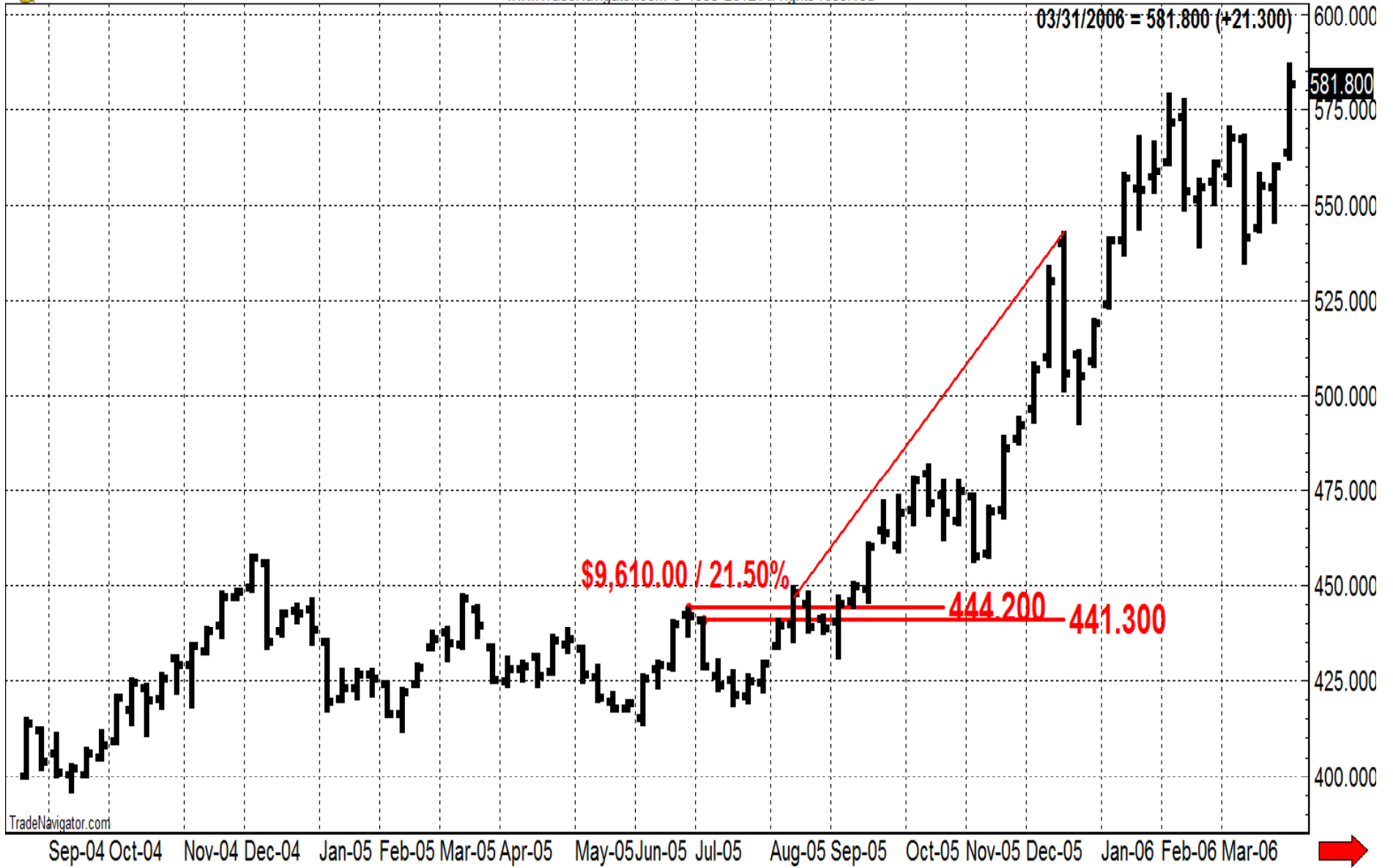
**June high July high are critical
levels. A weekly close ABOVE
either or both of these levels
has been a very reliable buy
indicator for a seasonal rally**

A FEW EXAMPLES



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

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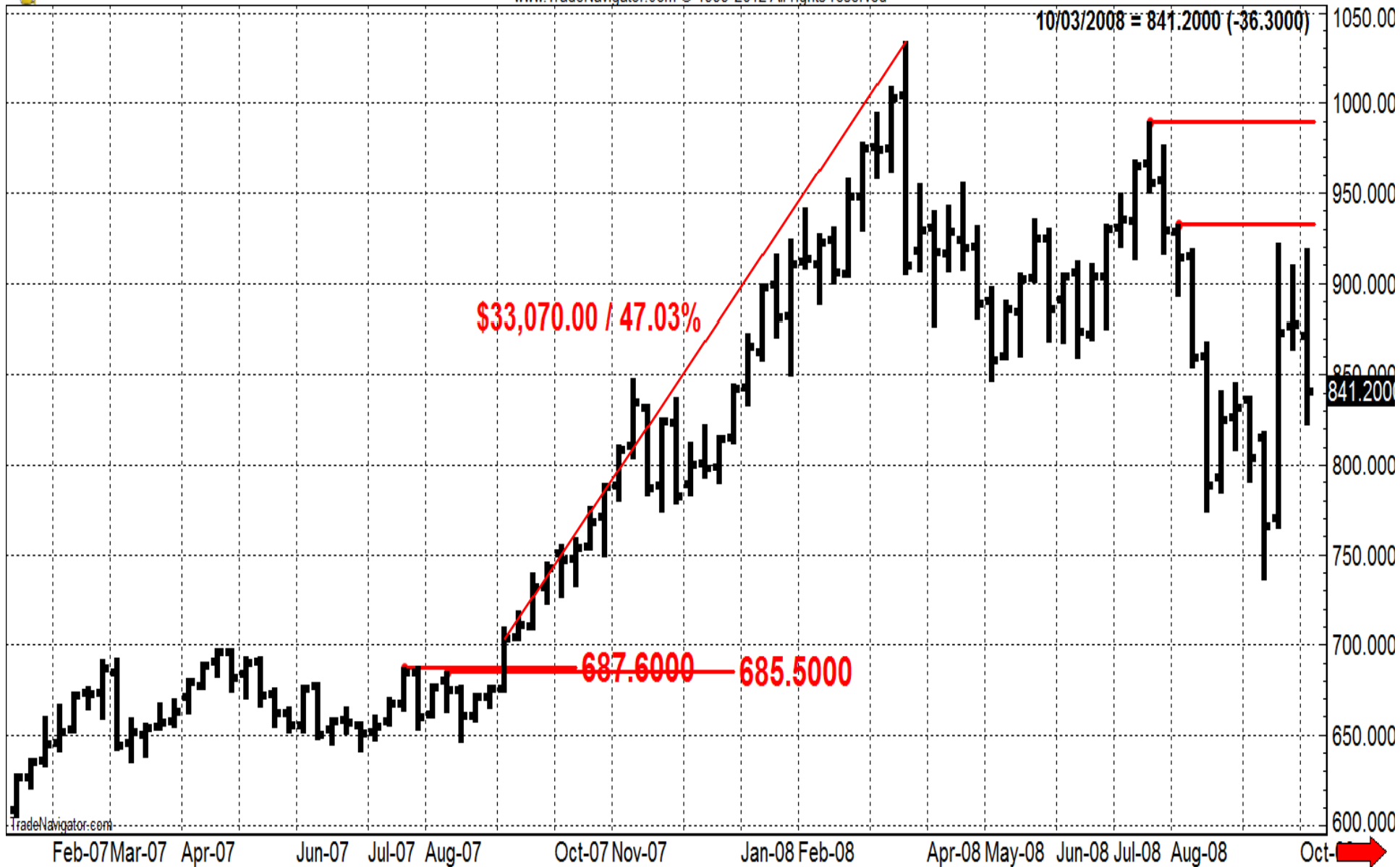
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GC2-055: Gold Comex (Comb) Cont 1st (Weekly bars)

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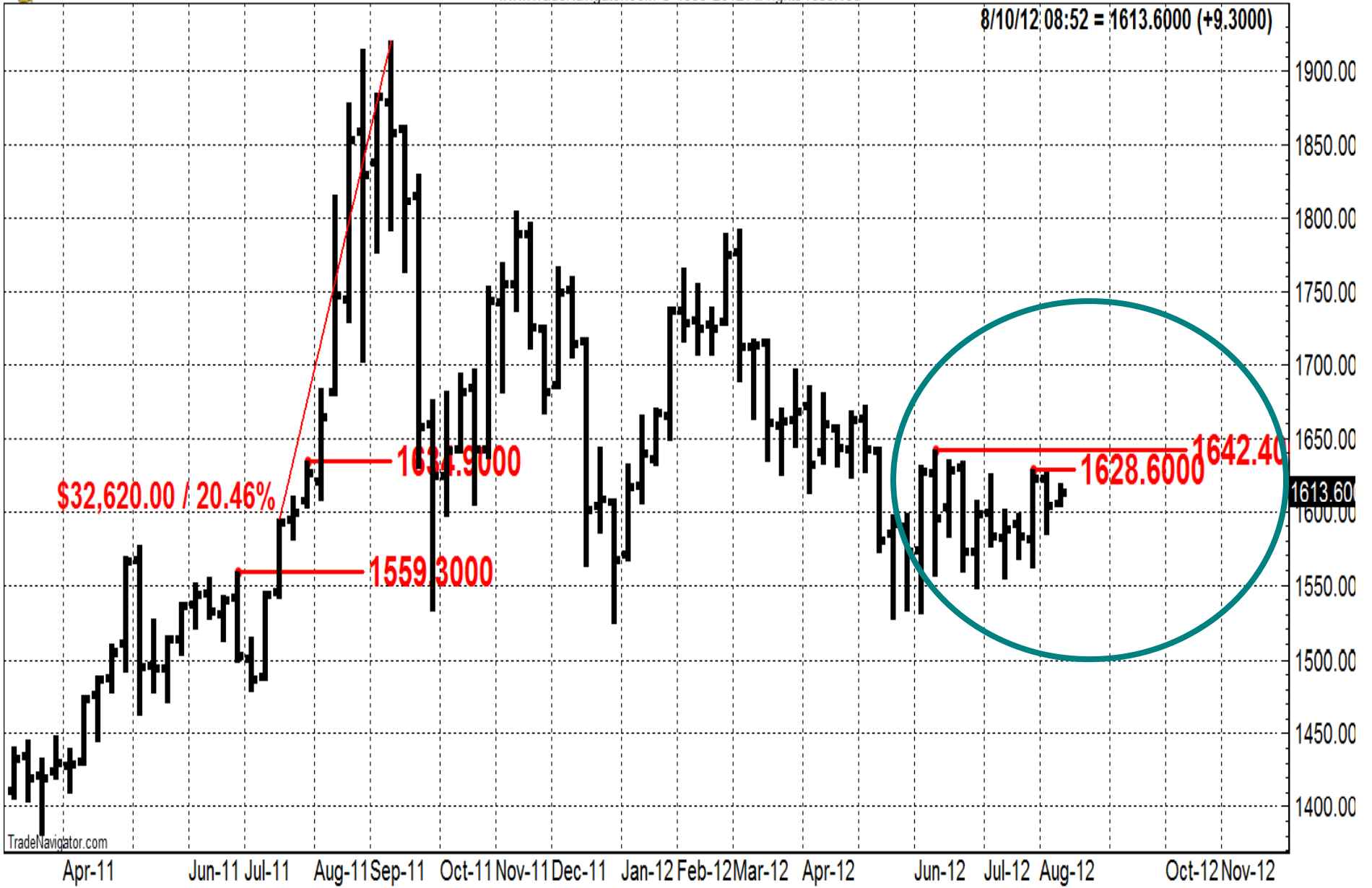




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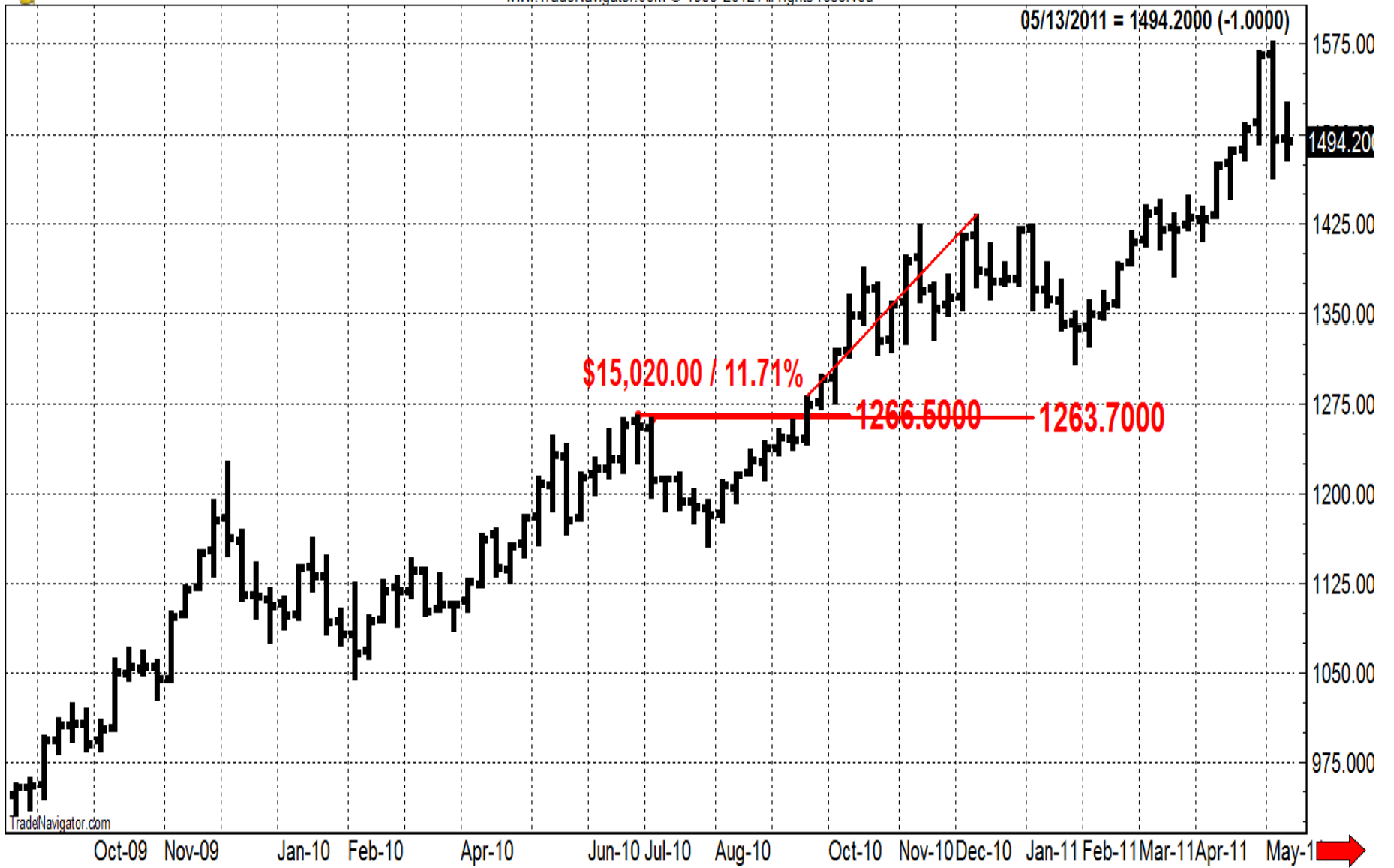
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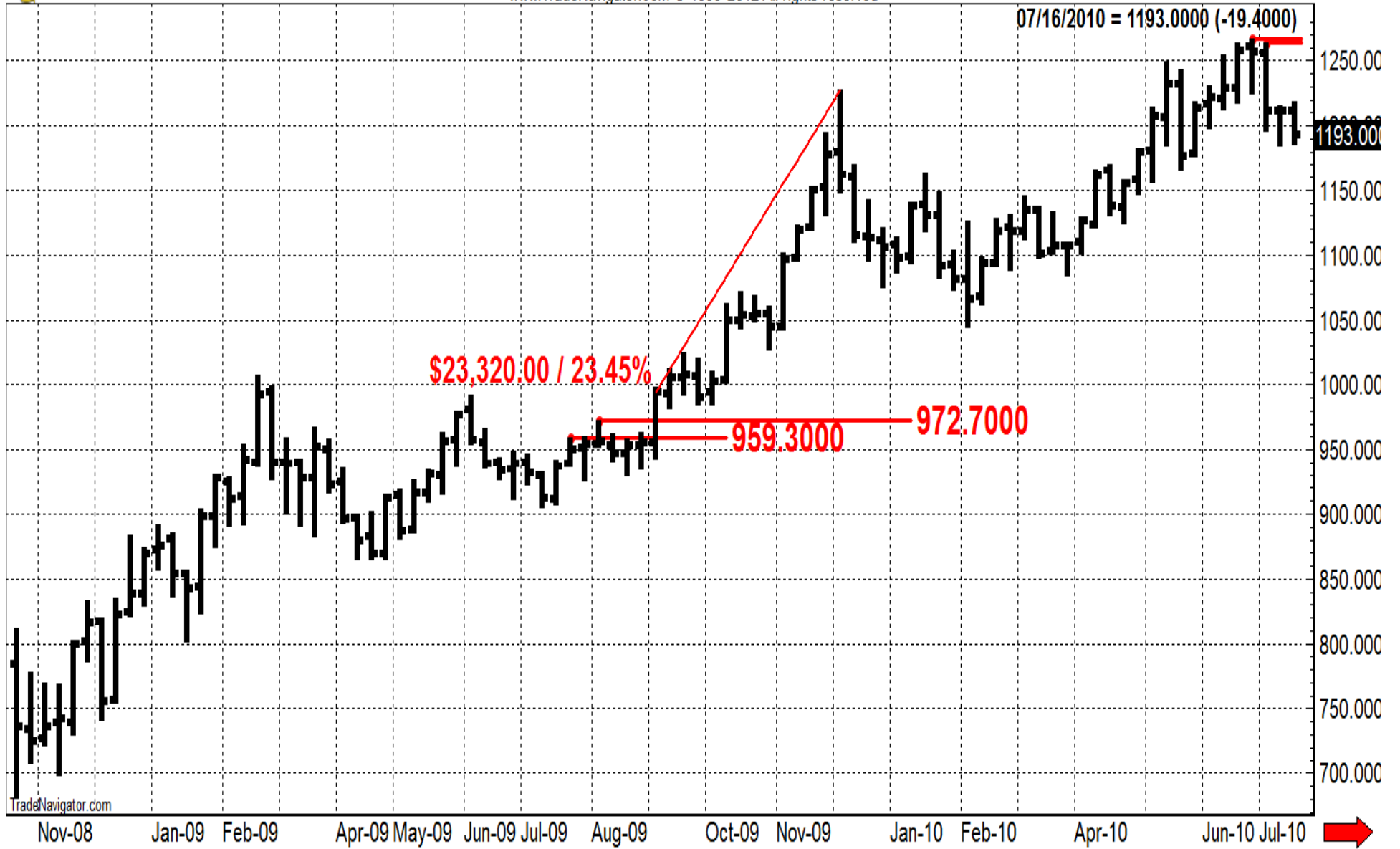
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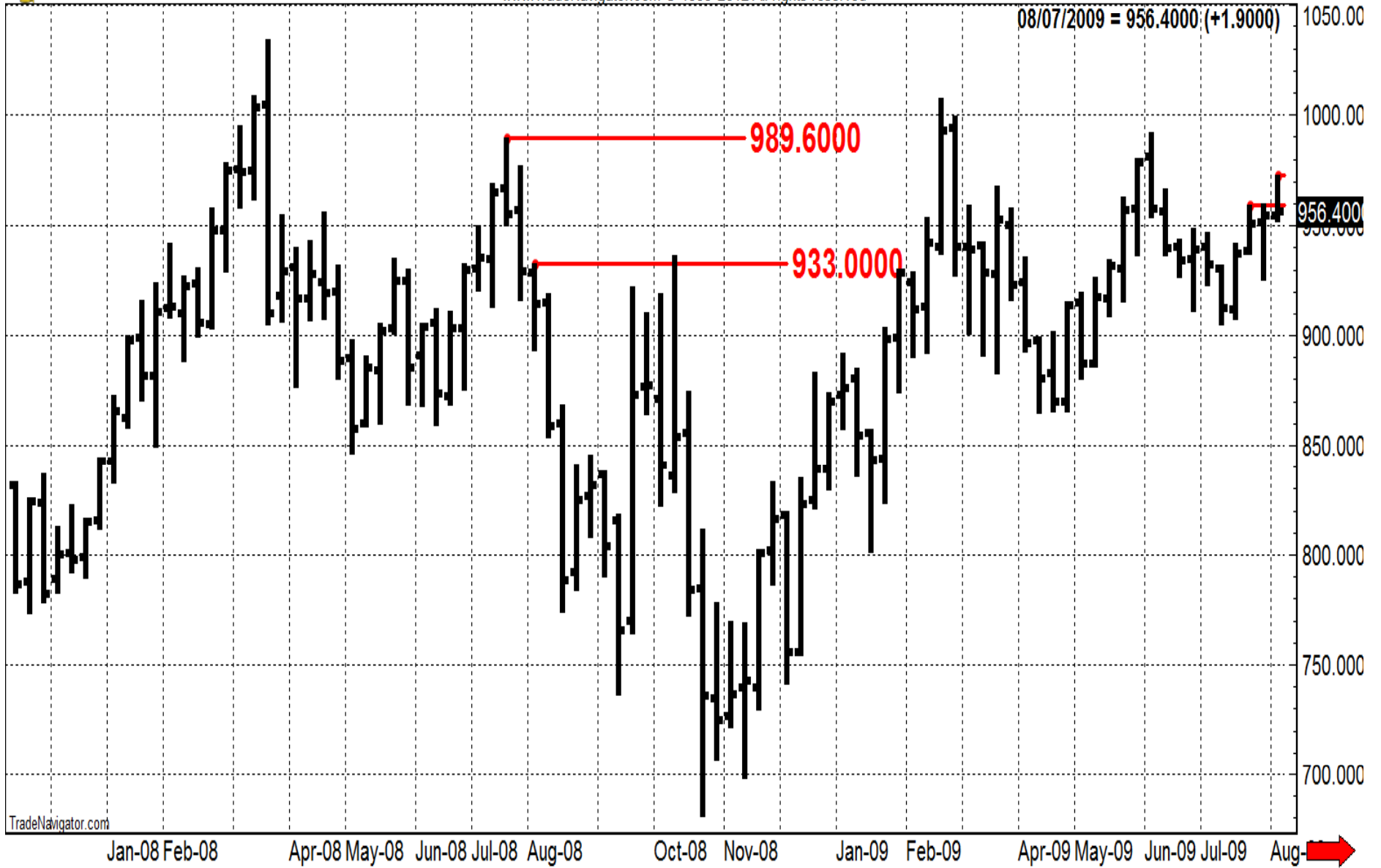
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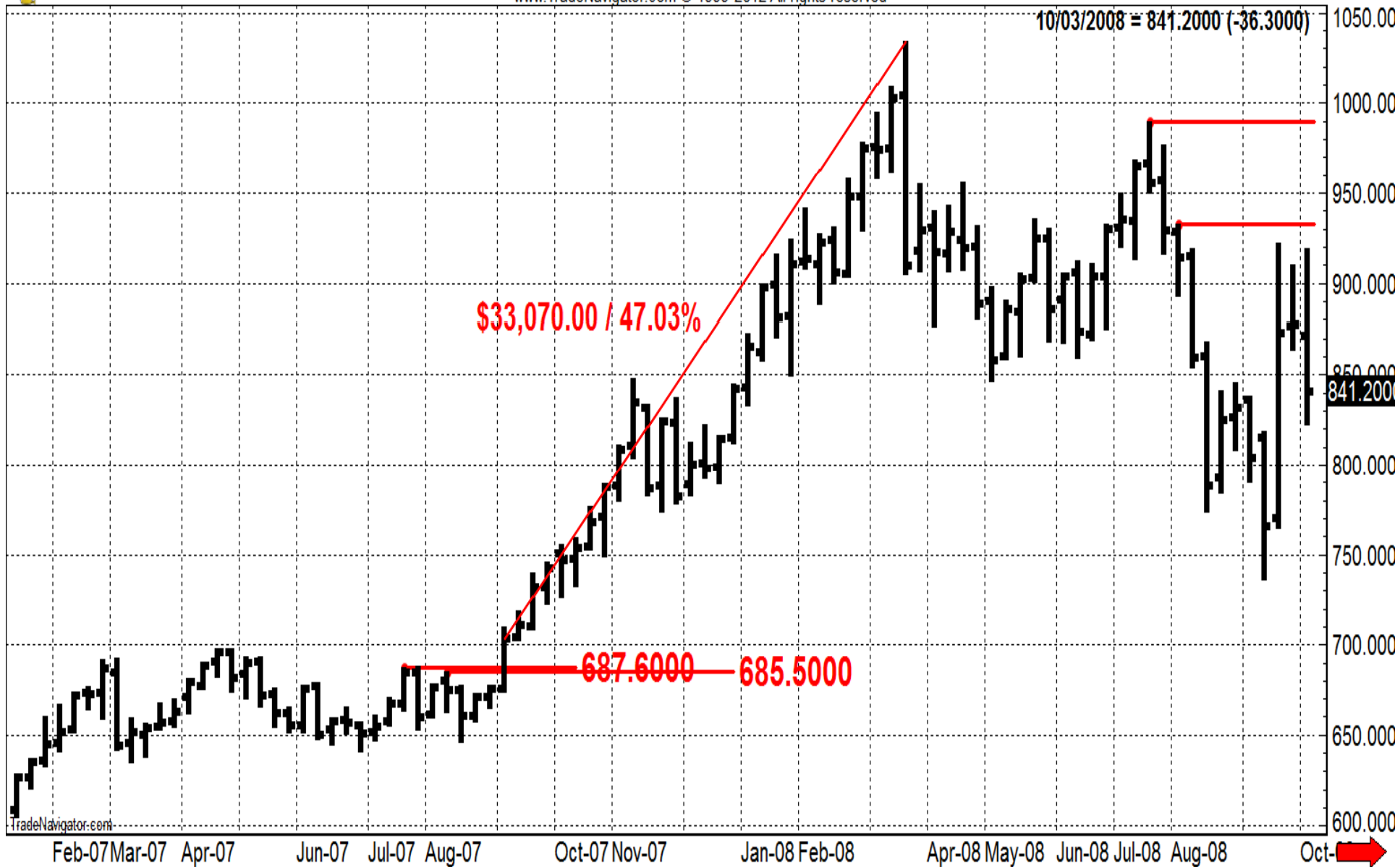
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GC2-055: Gold Comex (Comb) Cont 1st (Weekly bars)

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

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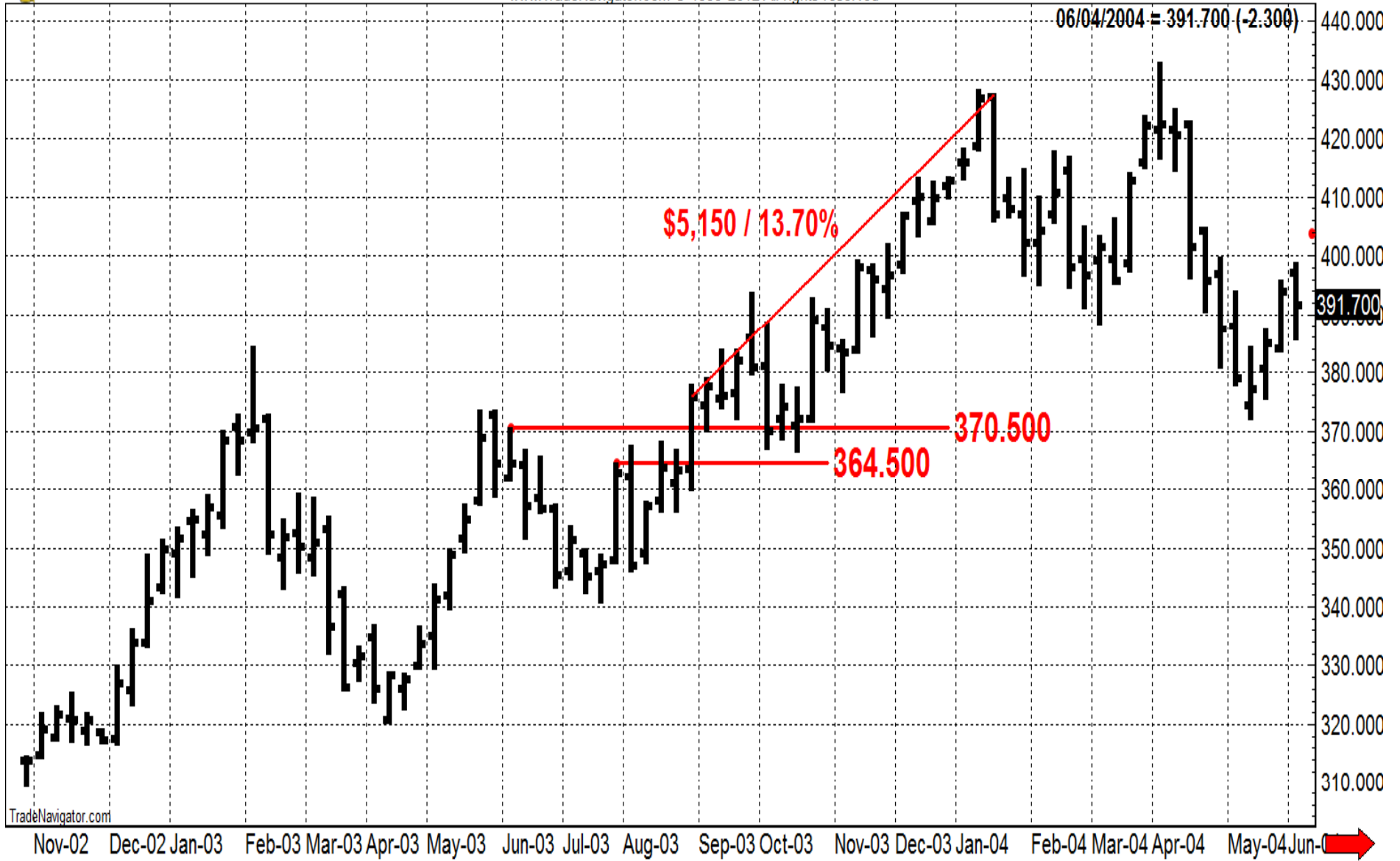
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GC-055: Gold Comex (Pit) Cont 1st (Weekly bars)

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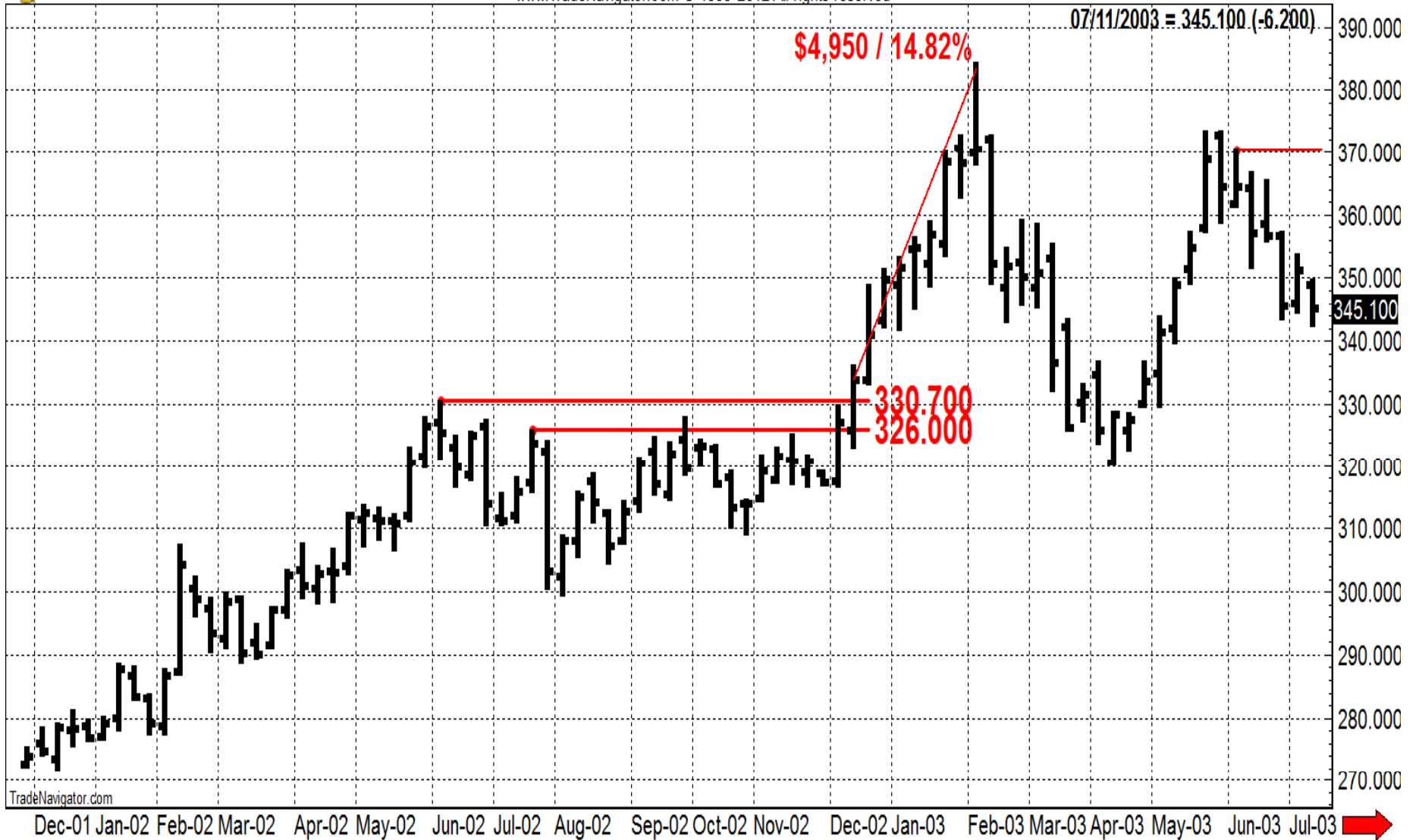


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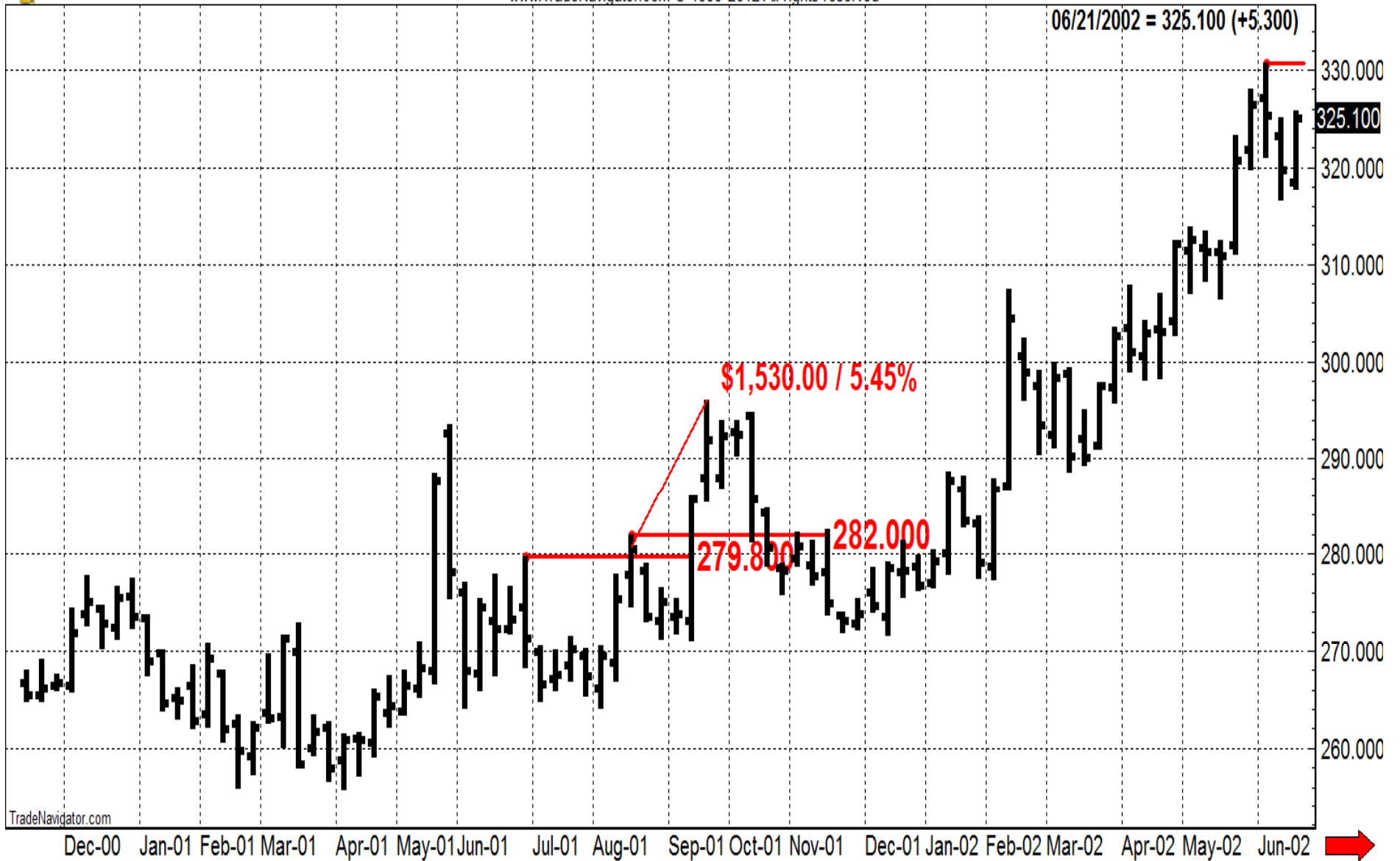


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GC-055: Gold Comex (Pit) Cont 1st (Weekly bars)

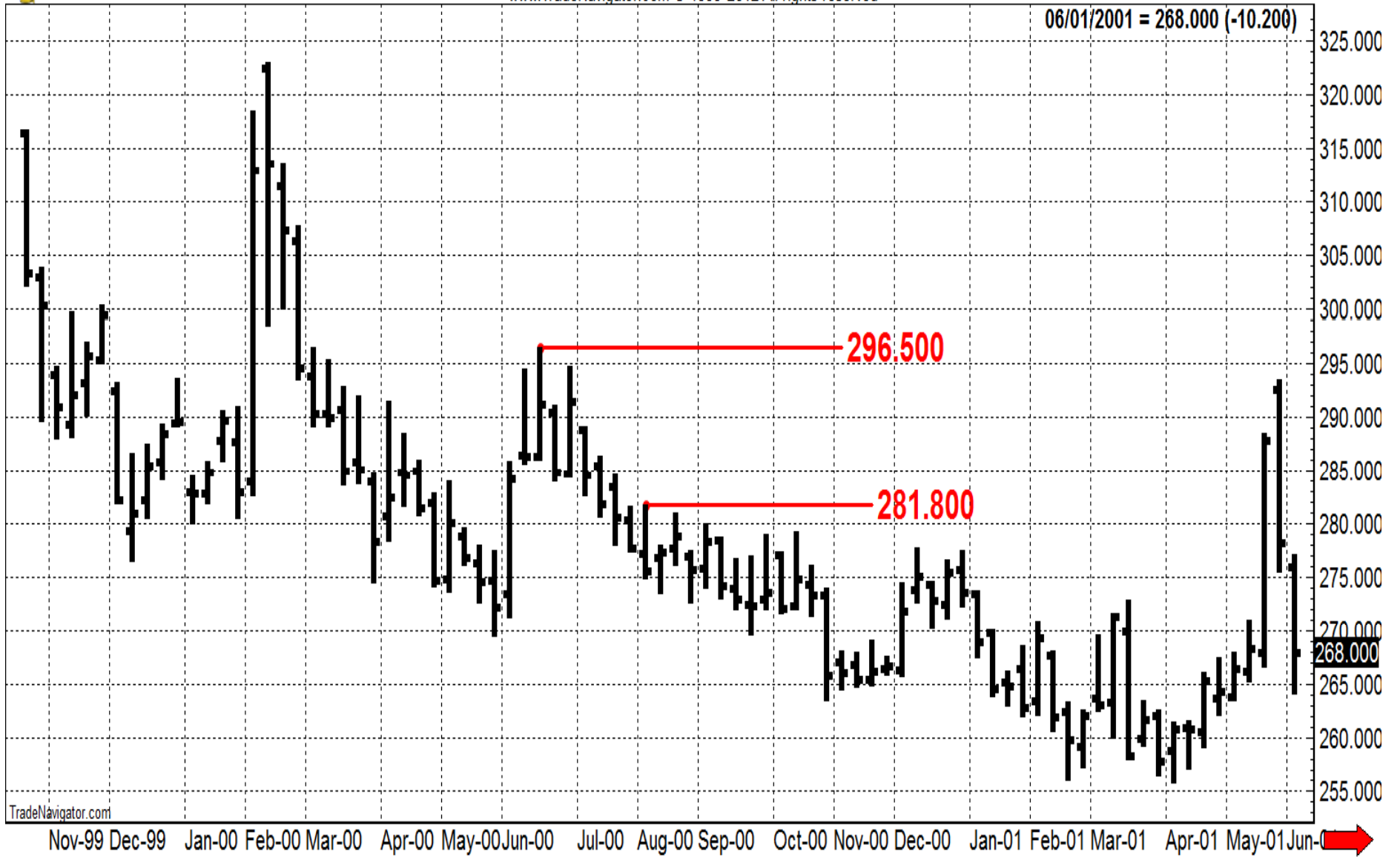
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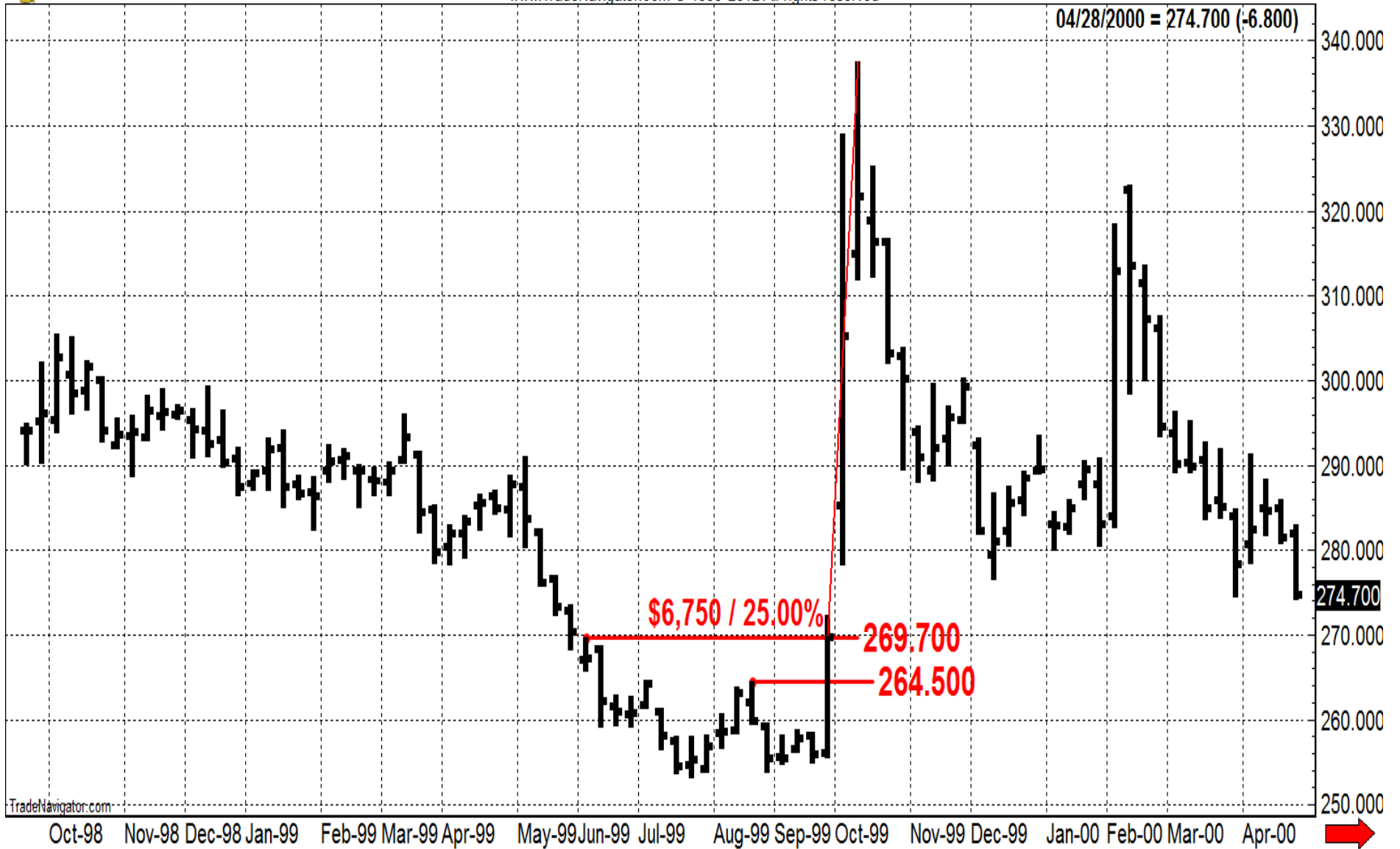


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GC-055: Gold Comex (Pit) Cont 1st (Weekly bars)

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Order Details


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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: ~~452,~~

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-



GC2-201212: Gold Comex (Comb) Dec 2012 (Daily bars)

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8/8/12 09:13 = 1615.1000 (+2.3000)



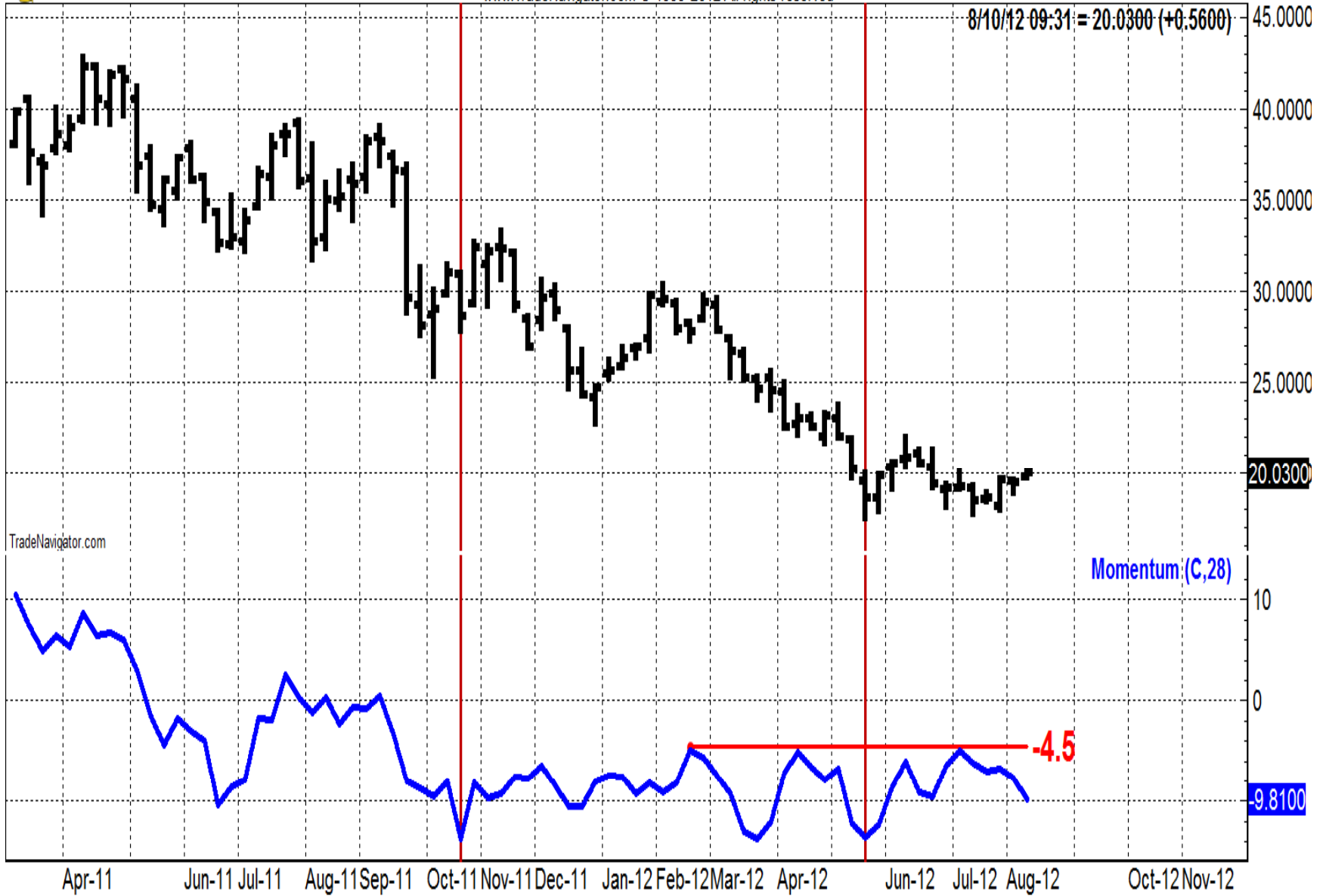
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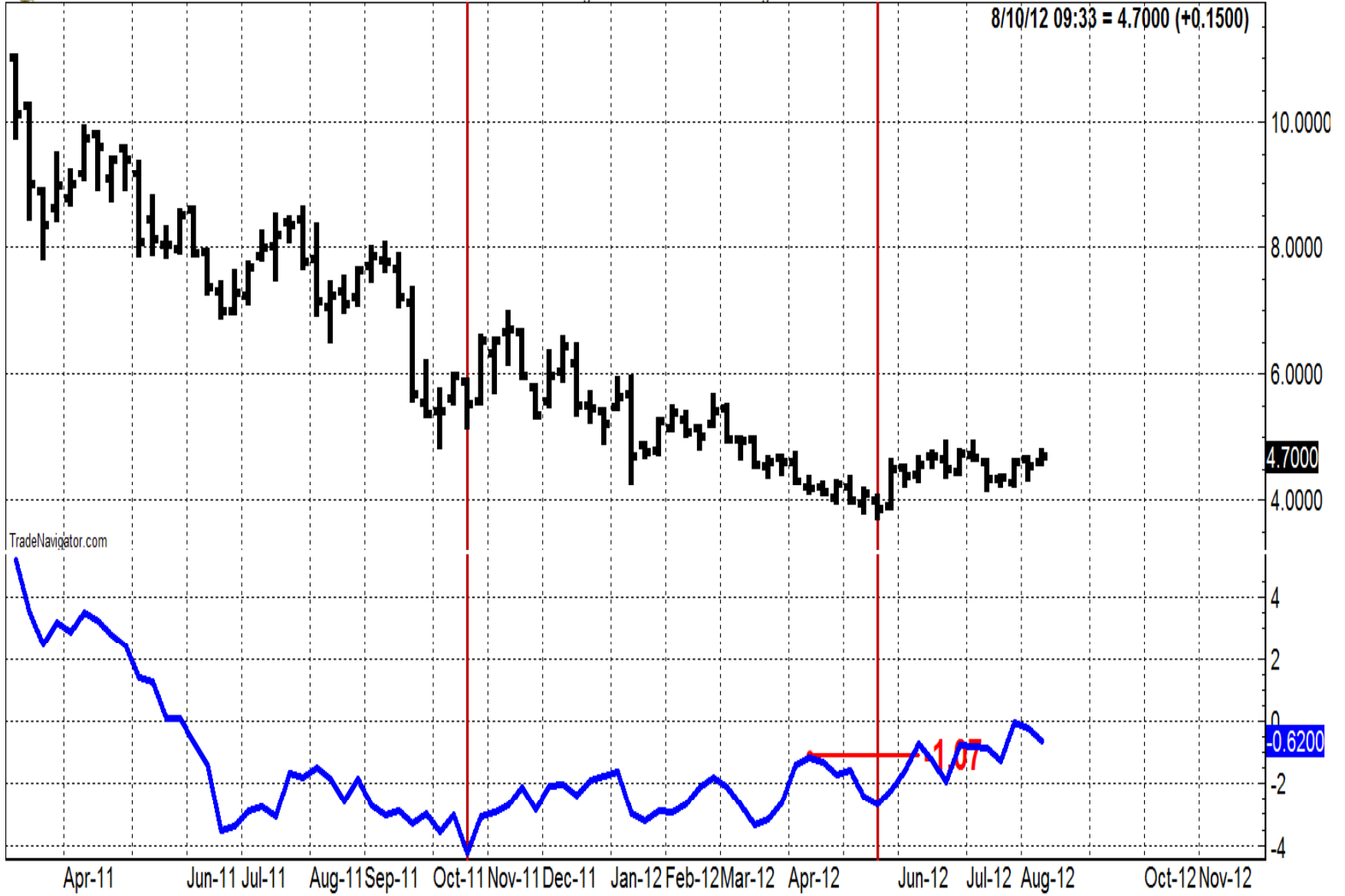
GDJ: Market Vectors Junior Gold Min (Weekly bars)

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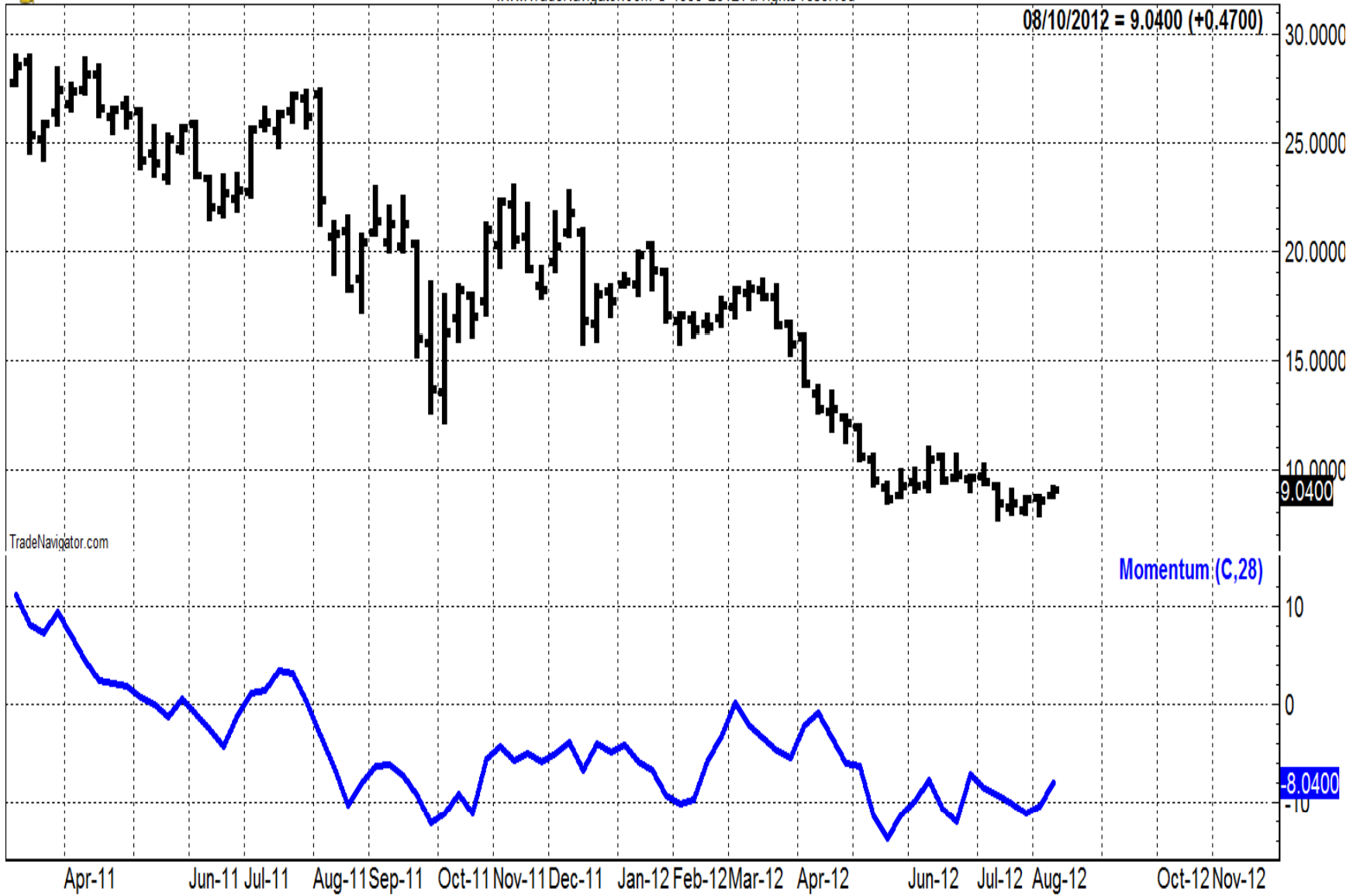


HL: Hecla Mining Company (Weekly bars)
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IVN: Ivanhoe Mines Ltd (Weekly bars)
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Name	Month	L/S	Entry Date	Exit Date	Stop %	P/L Ratio	% Wins	Avg Profit	Avg Loss	% Avg Profit	% Avg Loss	Max Wins	Max Up Swing	Max Loss
Gold	Oct	L	8/30	9/21	8.00	3.6	70.3	24.5	-16.1	5.41	3.37	7	264.3	3
Gold	Oct	L	8/31	9/21	8.00	3.1	70.3	24.1	-18.2	5.42	4.02	7	245.6	2
Gold	Oct	L	8/30	9/23	8.00	2.1	70.3	23.9	-27.0	5.31	3.91	7	256.1	3
Gold	Oct	L	8/31	9/23	8.00	1.9	70.3	23.5	-28.8	5.31	4.41	7	237.4	3
Gold	Dec	L	8/30	9/28	3.00	2.3	70.3	20.4	-20.9	5.23	3.68	9	157.1	3
Gold	Dec	L	8/31	10/8	7.00	1.6	70.3	24.4	-37.0	5.76	5.77	7	203.3	3
Gold	Dec	L	8/31	10/7	7.00	1.5	70.3	23.6	-37.2	5.76	5.80	7	178.5	3
Gold	Oct	S	8/11	8/25	8.00	0.9	70.3	5.5	-14.0	1.73	2.98	7	36.3	2
Gold	Oct	S	8/11	8/25	7.00	0.5	70.3	5.5	-26.3	1.73	3.58	7	36.3	2
Gold	Dec	S	8/11	8/25	8.00	0.9	70.3	5.5	-14.3	1.72	3.02	7	36.5	2
Gold	Dec	S	8/11	8/25	7.00	0.5	70.3	5.5	-26.6	1.72	3.60	7	36.5	2

Name	Month	L/S	Entry Date	Exit Date	Stop %	P/L Ratio	% Wins	Avg Profit	Avg Loss	% Avg Profit	% Avg Loss	Max Wins	Max Up Swing	Max Loss
Gold	Feb	L	9/15	9/25	2.00	3.4	78.4	13.0	-13.9	2.90	2.10	12	186.4	2
Gold	Feb	L	9/15	9/26	2.00	3.1	78.4	11.9	-14.1	2.69	2.14	12	185.6	2
Gold	Oct	L	9/15	9/25	2.00	3.3	78.4	12.7	-13.9	2.86	2.10	12	185.1	2
Gold	Oct	L	9/5	9/23	8.00	1.5	78.4	16.2	-39.3	3.45	5.87	7	188.3	2
Gold	Oct	L	9/5	9/24	8.00	1.5	78.4	16.1	-39.4	3.55	5.83	7	138.8	1
Gold	Oct	L	9/8	9/24	8.00	1.3	78.4	14.6	-42.0	3.38	5.42	9	117.8	2
Gold	Dec	L	9/14	9/26	2.00	3.9	78.4	12.7	-11.9	2.94	1.93	12	197.0	2
Gold	Dec	L	9/15	9/25	2.00	3.4	78.4	13.1	-14.1	2.93	2.10	12	188.7	2
Gold	Dec	L	9/15	9/26	2.00	3.1	78.4	12.0	-14.3	2.74	2.14	12	191.4	2
Gold	Dec	L	9/9	9/23	6.00	2.2	78.4	15.1	-25.0	3.17	3.75	9	189.8	2
Gold	Dec	L	9/13	9/26	4.00	2.1	78.4	13.5	-23.5	2.93	3.71	12	192.1	2
Gold	Dec	L	9/5	9/23	8.00	1.5	78.4	16.5	-40.5	3.49	6.06	7	190.6	2
Gold	Dec	L	9/8	9/24	8.00	1.3	78.4	15.0	-42.1	3.44	5.43	9	119.6	2

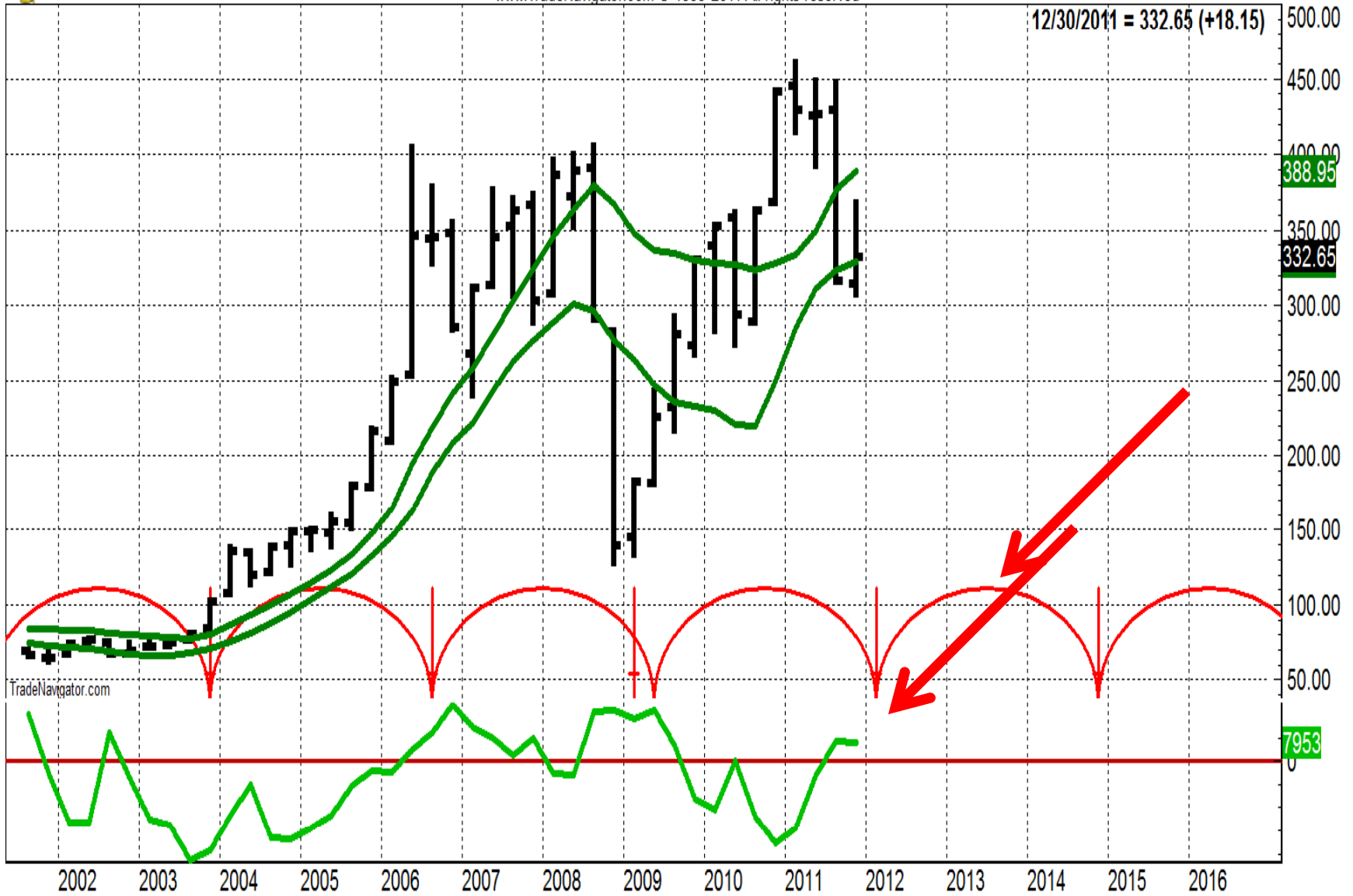
COPPER

- China keeps hoarding
- Cycles are bullish
- Commercials are buyers
- Long term trend is up
- COPPER miners are my preference
- FCX SCCO COPX JJC WRN (spec)



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

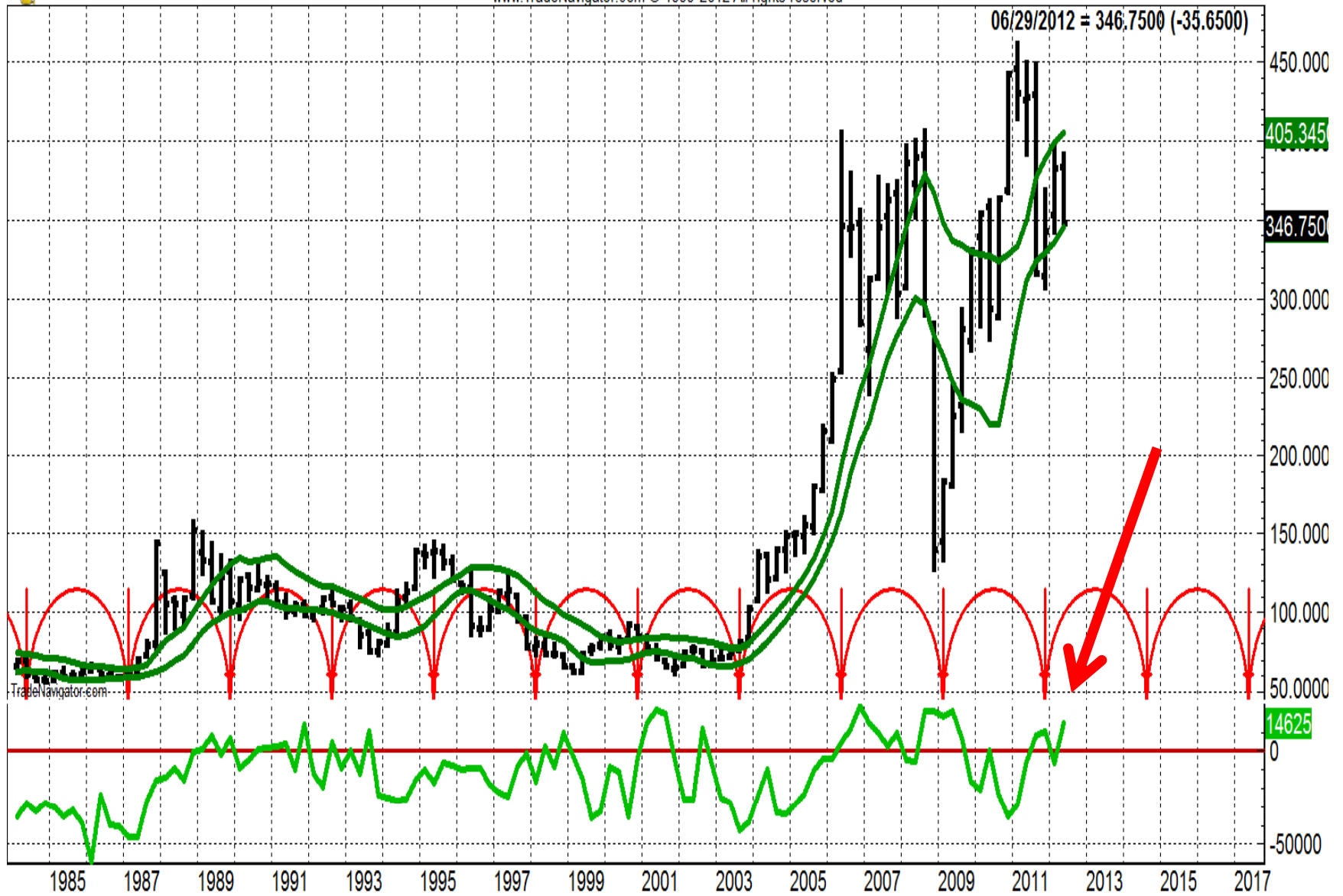
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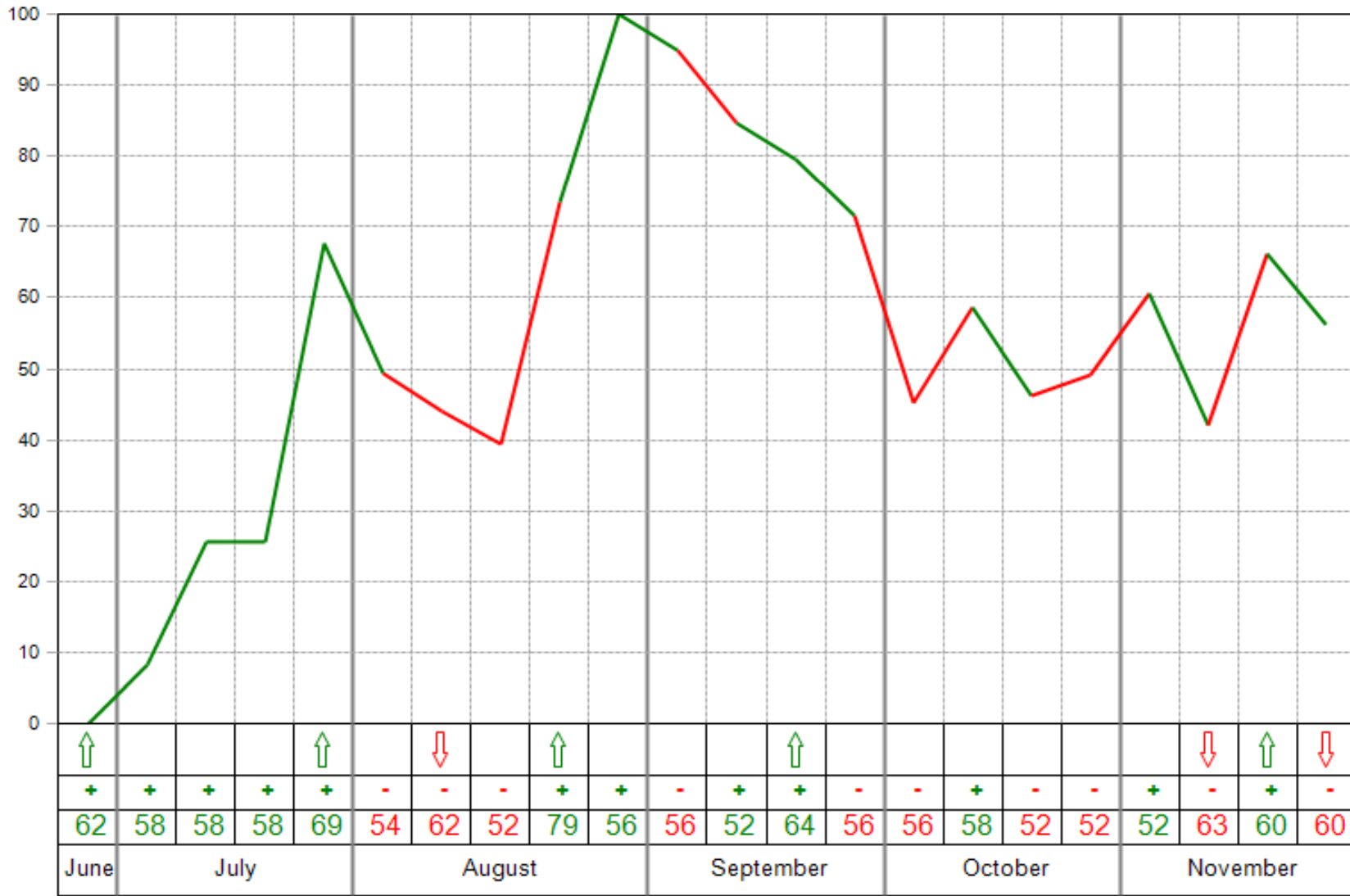


HG-055: Copper HG NYMX (Pit) Cont 1st (Quarterly bars)

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WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - Copper 1987 - 2012

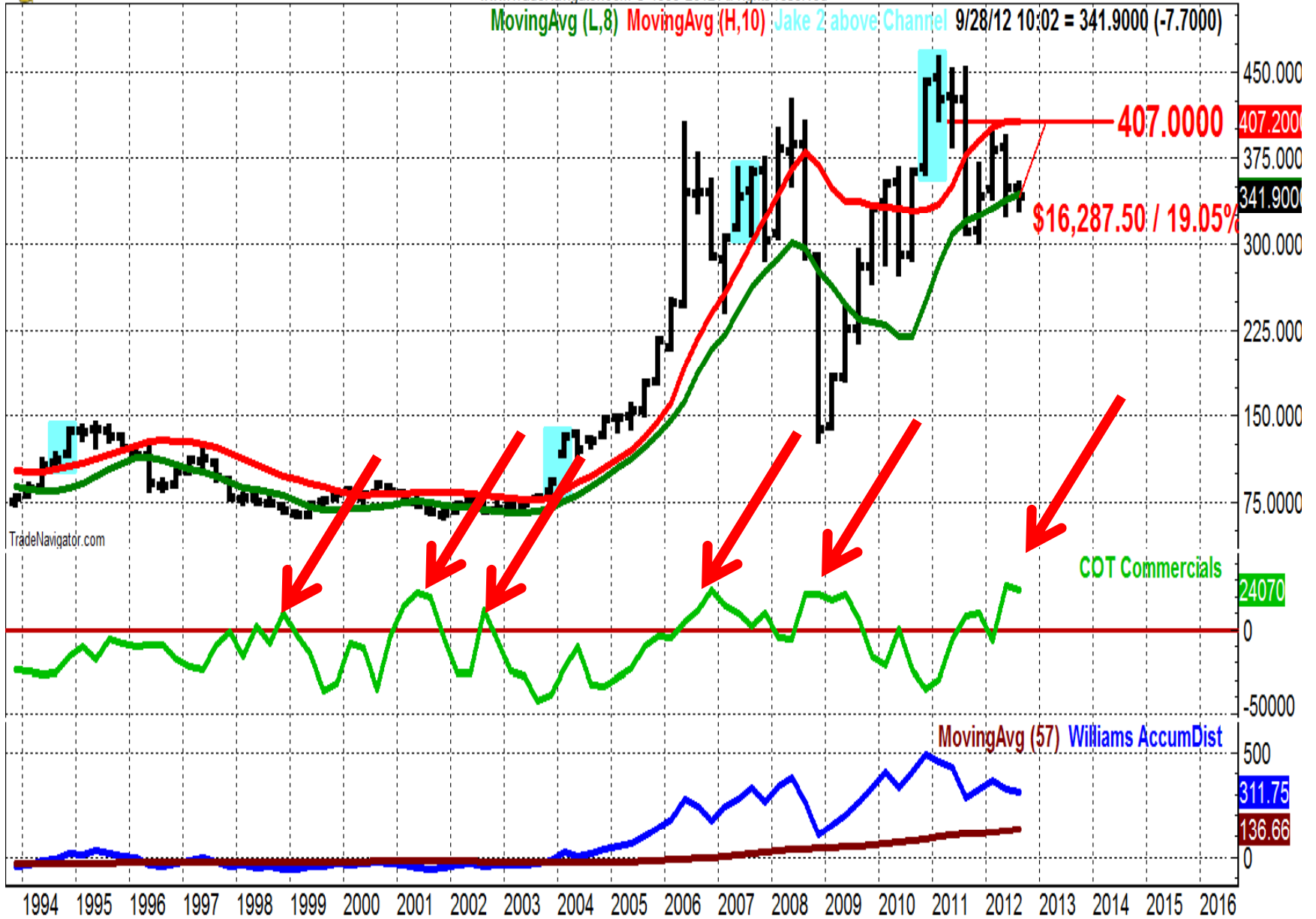


2012



HG2-055: Copper HG NYMX (Comb) Cont 1st (Quarterly bars)

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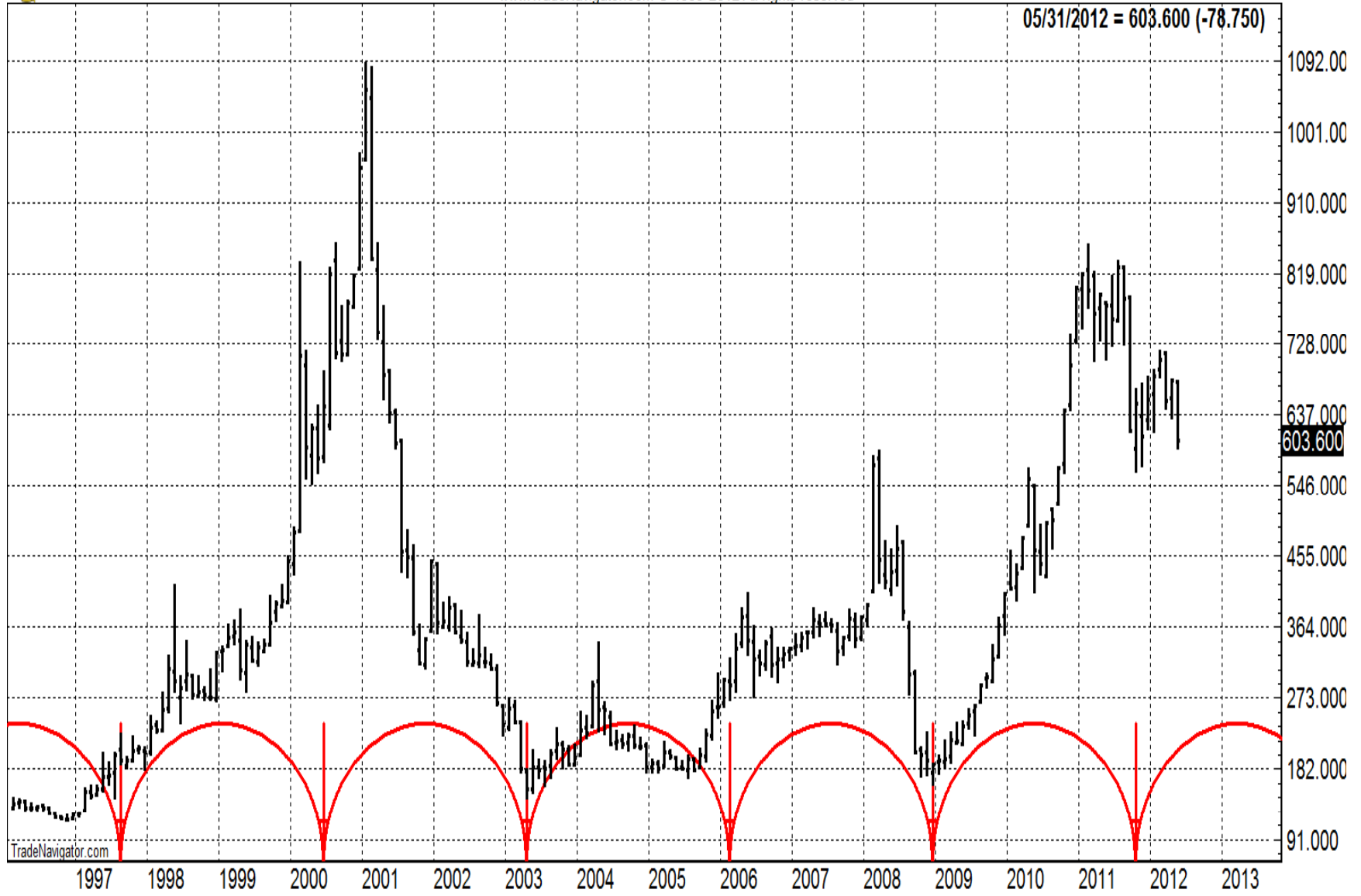
Copper Seasonals

Name	Month	L/S	Entry Date	Exit Date	Stop %	P/L Ratio	% Wins	Avg Profit	Avg Loss	% Avg Profit	% Avg Loss	Max Wins	Max Up Swing
Copper	Dec	L	8/18	9/4	5.00	3.4	70.0	4.59	-3.15	3.20	3.33	6	45.45
Copper	Sep	S	8/2	8/20	7.00	5.4	71.8	5.37	-2.54	2.82	2.61	6	105.95
Copper	Sep	S	8/1	8/6	5.00	5.3	71.8	4.03	-1.93	2.17	2.06	6	79.00
Copper	Sep	S	8/1	8/6	3.00	4.8	71.8	4.03	-2.15	2.17	2.24	6	79.00
Copper	Sep	S	8/1	8/20	7.00	4.7	71.8	6.24	-3.41	3.26	3.49	9	124.30
Copper	Sep	S	8/2	8/19	7.00	4.6	71.8	4.97	-2.74	2.73	2.69	12	65.20
Copper	Sep	S	8/2	8/19	6.00	3.3	71.8	4.97	-3.78	2.73	2.88	12	65.20
Copper	Sep	S	8/1	8/21	7.00	3.3	71.8	6.05	-4.62	3.46	3.85	9	56.75
Copper	Sep	S	8/1	8/21	5.00	2.9	71.8	6.05	-5.24	3.46	4.48	9	56.75
Copper	Dec	S	9/6	10/1	100.00	2.1	75.0	8.54	-12.38	4.97	8.21	14	99.45
Copper	Dec	S	9/6	10/1	7.00	2.5	72.5	8.81	-9.21	5.11	6.21	14	99.45
Copper	Dec	S	9/6	10/2	100.00	2.3	72.5	9.70	-10.98	5.56	7.36	13	99.45



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

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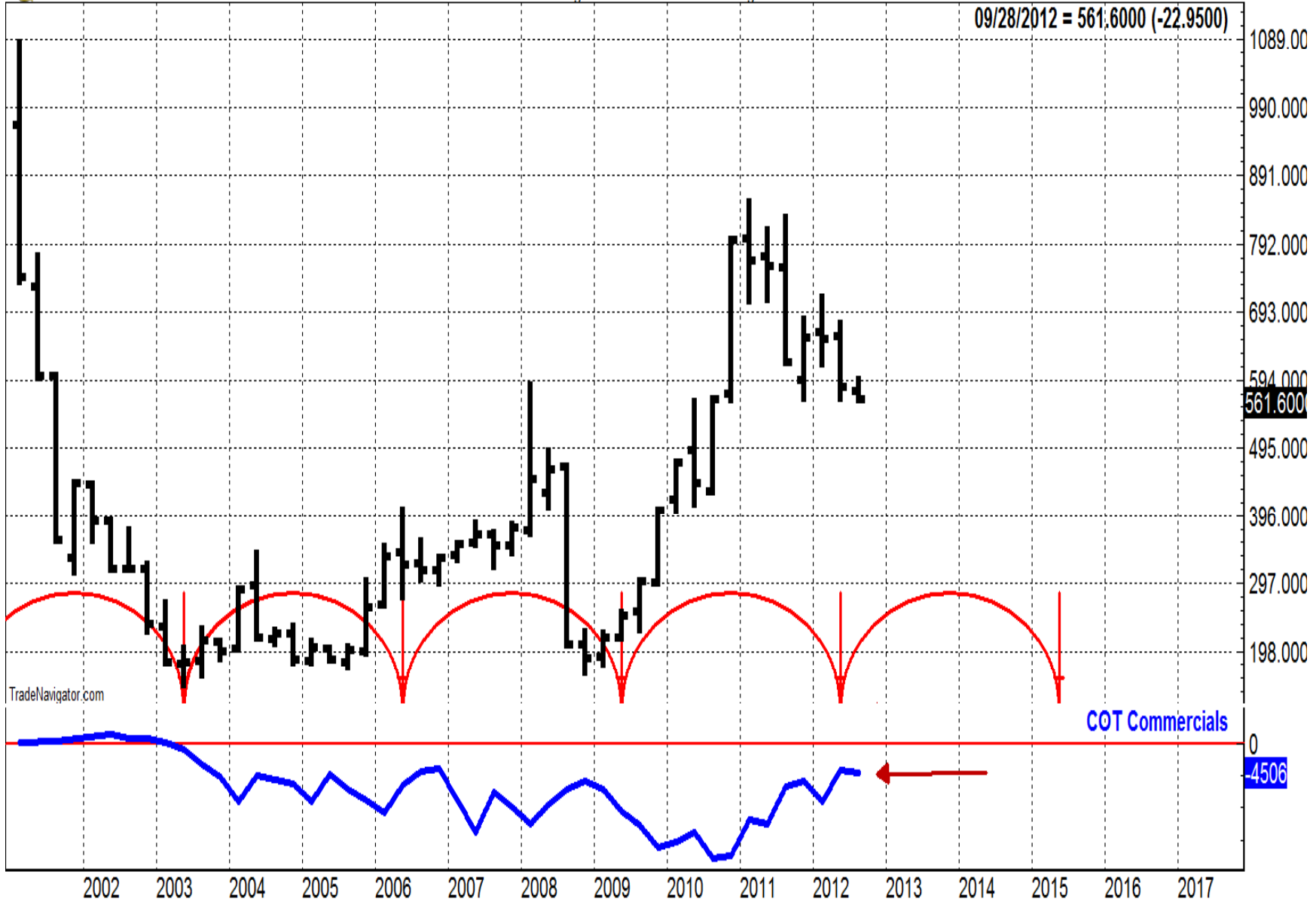




PA-055: Palladium (Pit) Cont 1st (Quarterly bars)

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09/28/2012 = 561.6000 (-22.9500)



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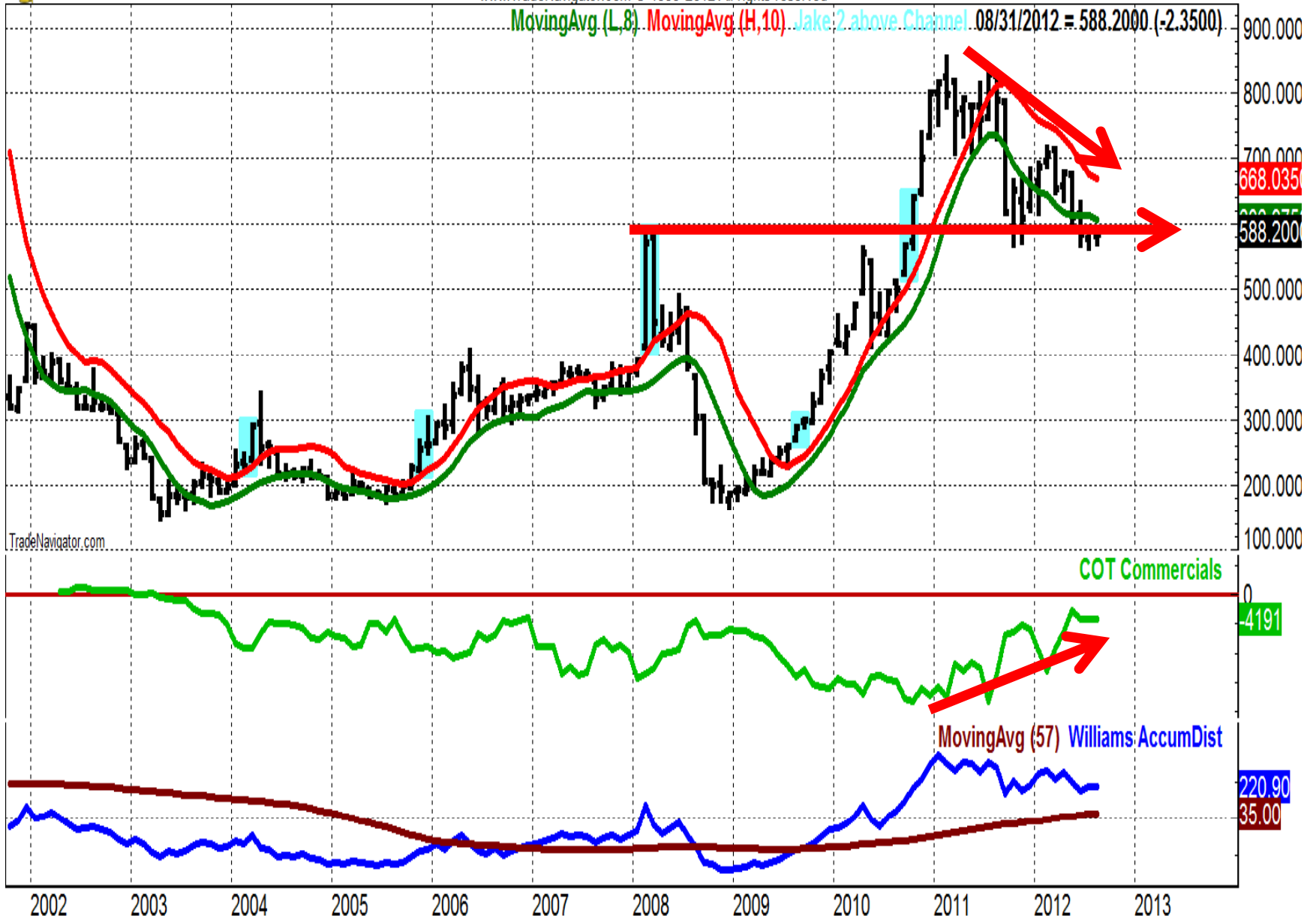
COT Commercials

-4506



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

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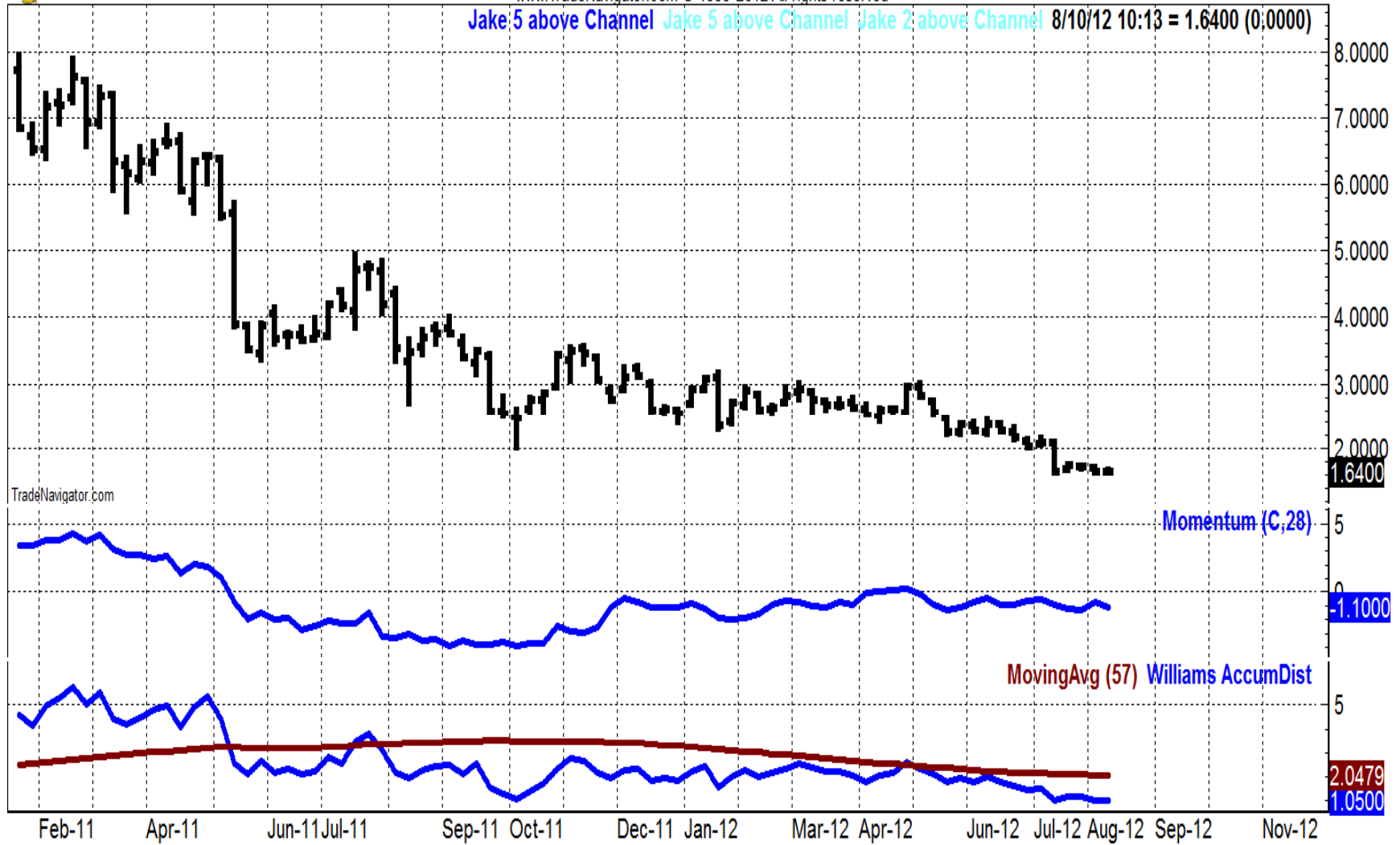
PAL



PAL: North American Palladium, Ltd. (Weekly bars)

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Jake 5 above Channel Jake 5 above Channel Jake 2 above Channel 8/10/12 10:13 = 1.6400 (0:0000)

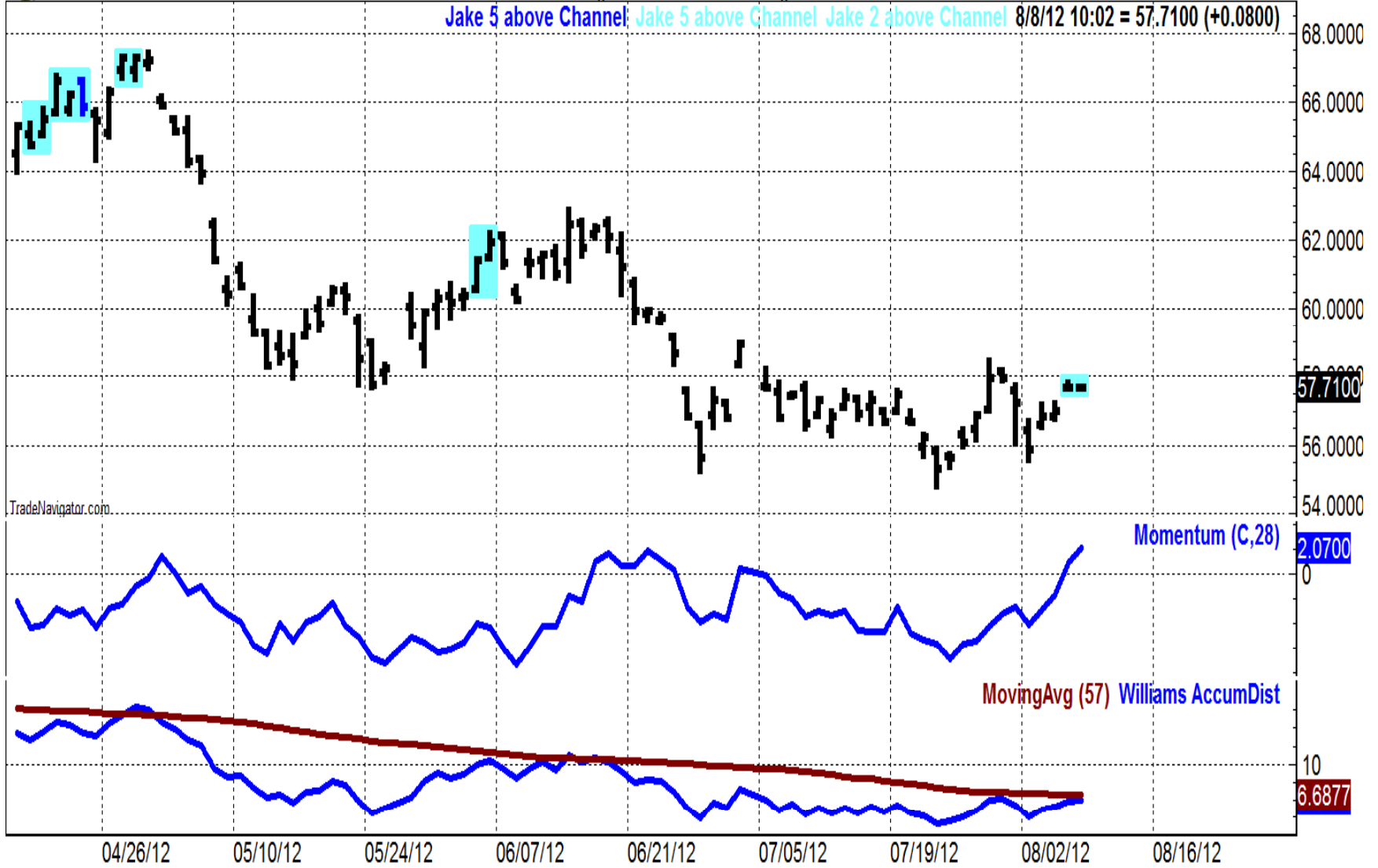




PALL: ETFS Physical Palladium Shares (Daily bars)

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Jake 5 above Channel Jake 5 above Channel Jake 2 above Channel 8/8/12 10:02 = 57.7100 (+0.0800)



SILVER

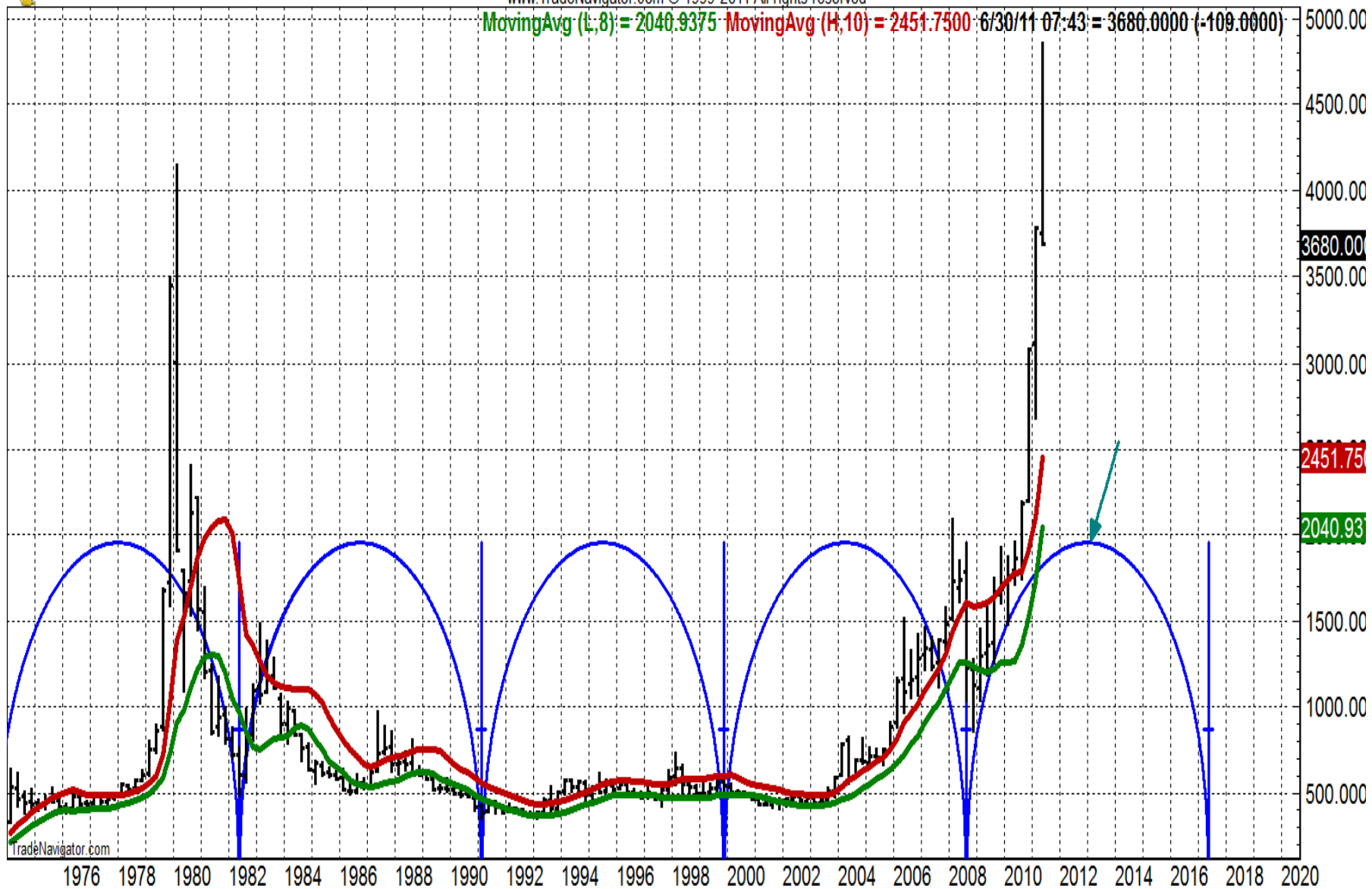
- Ratios
- Better than gold?
- Cycles
- Support and Resistance



SI-055: Silver Comex (Pit) Cont 1st (Quarterly bars)

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MovingAvg (L,8) = 2040.9375 MovingAvg (H,10) = 2451.7500 6/30/11 07:43 = 3680.0000 (-109.0000)

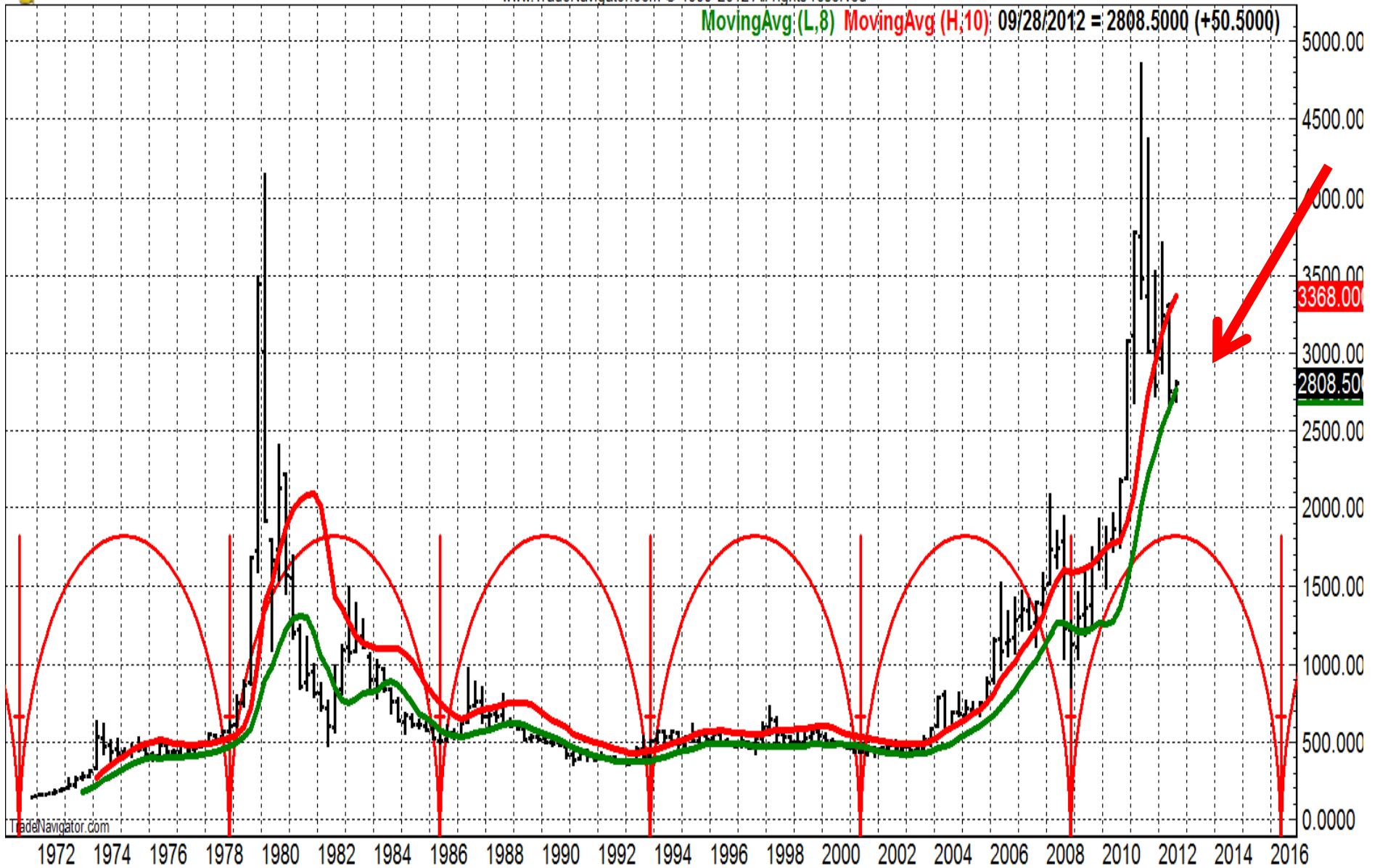




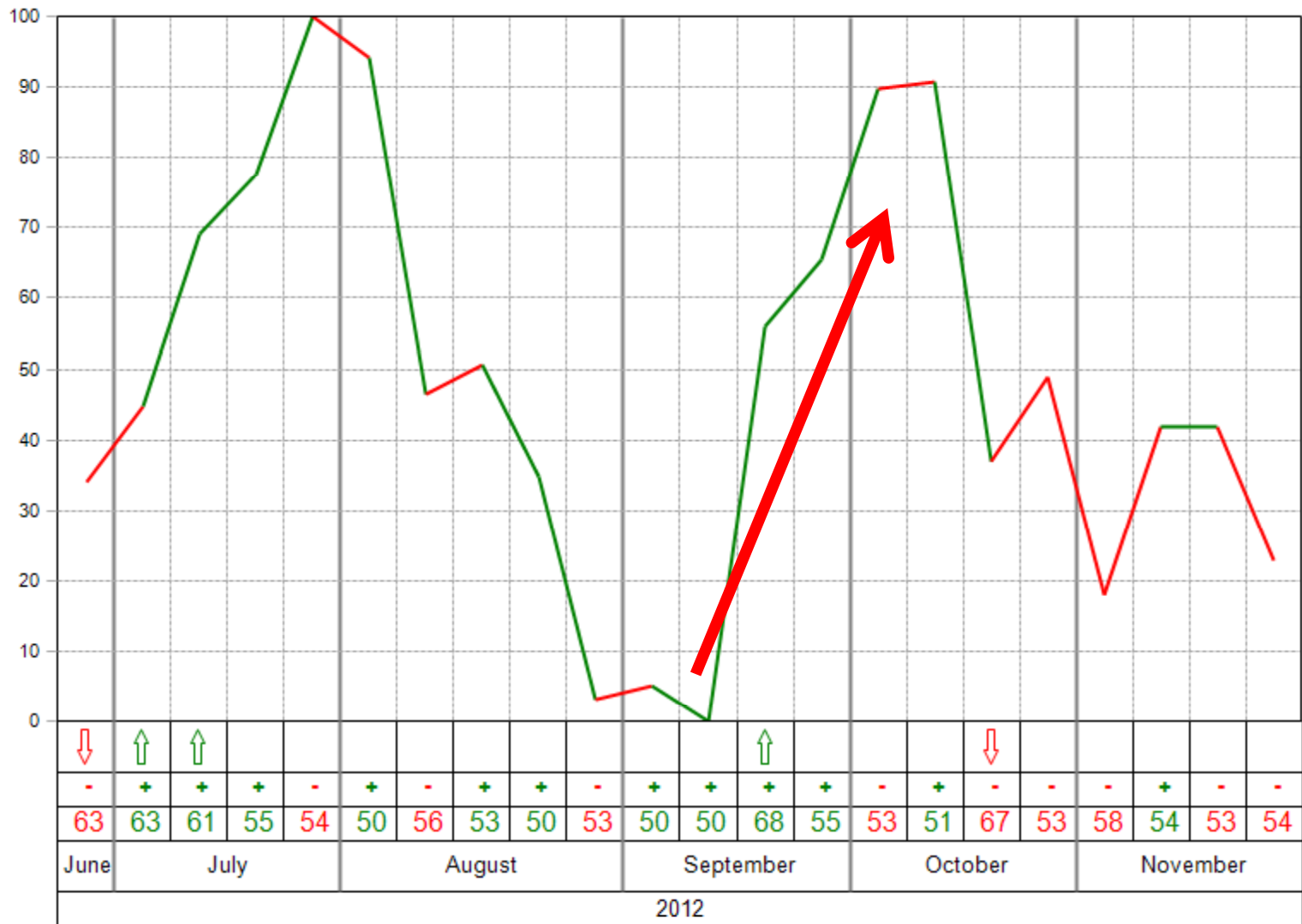
SI-055: Silver Comex (Pit) Cont 1st (Quarterly bars)

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MovingAvg:(L,8) MovingAvg:(H,10); 09/28/2012 = 2808.5000 (+50.5000)



WEEKLY SEASONAL COMPOSITE FUTURE CHARTS : December - Silver 1972 - 2012



2012

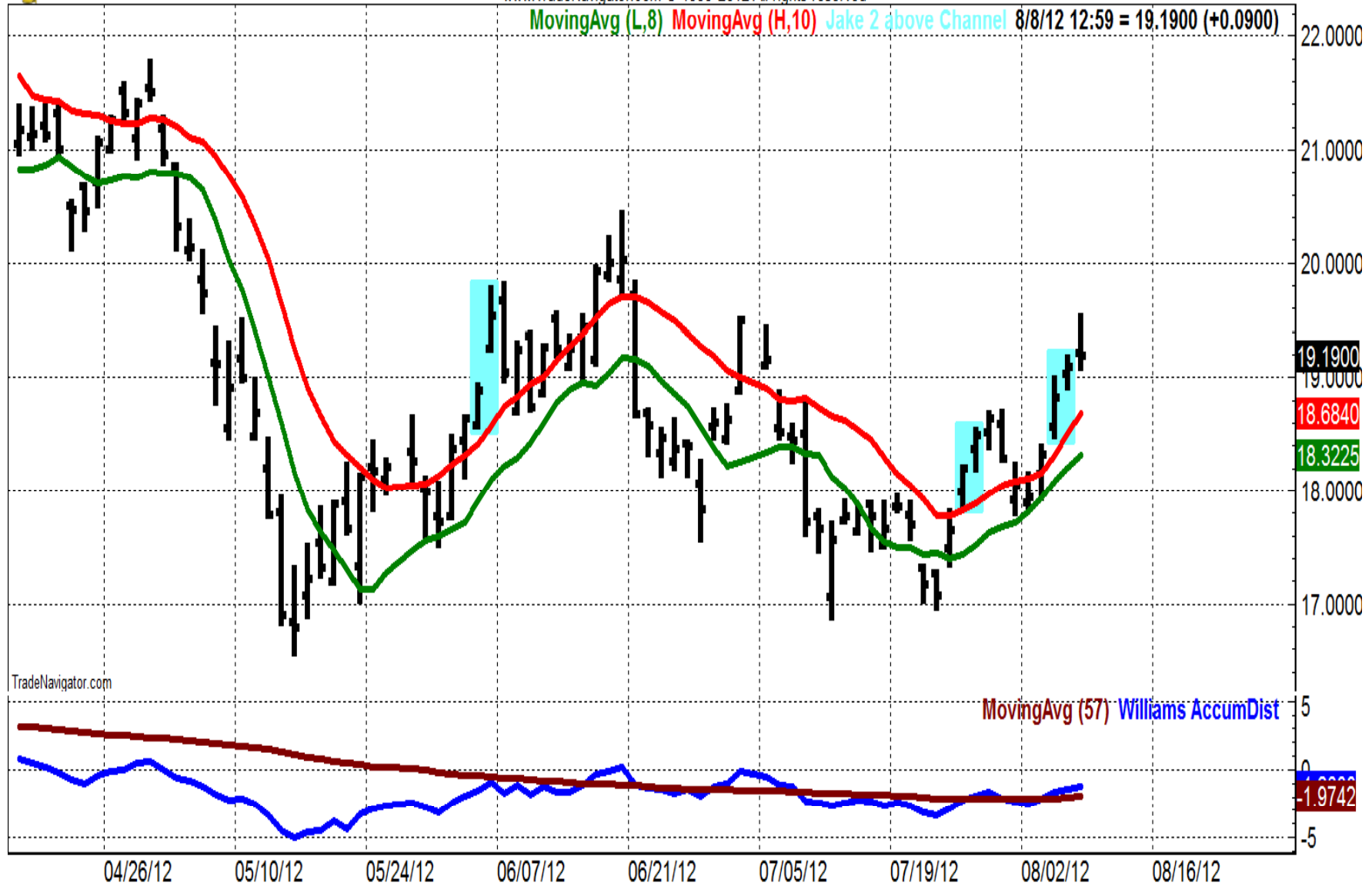
Name	Month	L/S	Entry Date	Exit Date	Stop %	P/L Ratio	% Wins	Avg Profit	Avg Loss	% Avg Profit	% Avg Loss	Max Wins	Max Up Swing	Max Loss
Silver	Dec	L	8/31	9/21	8.00	3.1	75.0	76.04	-72.96	7.52	7.37	10	1449.40	1
Silver	Dec	L	8/31	9/23	8.00	2.2	75.0	78.69	-107.88	7.76	8.01	10	1494.70	1
Silver	Dec	L	8/31	9/22	8.00	2.1	75.0	78.47	-109.55	7.82	8.09	10	1456.30	1
Silver	Dec	L	8/31	9/24	8.00	2.1	75.0	74.71	-109.18	7.67	8.11	10	1373.60	1

Name	Month	L/S	Entry Date	Exit Date	Stop %	P/L Ratio	% Wins	Avg Profit	Avg Loss	% Avg Profit	% Avg Loss	Max Wins	Max Up Swing	Max Loss
Silver	Dec	L	9/13	9/23	8.00	2.0	80.0	47.81	-95.14	4.77	5.88	13	737.70	2
Silver	Dec	L	9/13	9/21	8.00	3.5	77.5	44.80	-44.00	4.56	4.48	10	636.40	3
Silver	Dec	L	9/12	9/23	7.00	2.3	77.5	48.08	-70.54	5.00	4.55	13	685.70	3
Silver	Dec	L	9/14	9/23	6.00	2.2	77.5	48.31	-76.12	4.95	4.85	13	702.80	3
Silver	Dec	L	9/13	9/23	6.00	2.1	77.5	49.27	-82.57	4.91	5.61	13	737.70	2
Silver	Dec	L	9/17	9/23	4.00	2.0	77.5	36.25	-62.20	3.89	3.58	6	521.50	2
Silver	Dec	L	9/13	9/22	8.00	1.9	77.5	48.01	-85.17	4.85	5.35	12	669.80	3
Silver	Dec	L	9/16	9/23	4.00	1.7	77.5	39.70	-78.47	4.20	4.19	12	523.70	2
Silver	Dec	L	9/16	9/24	4.00	1.7	77.5	40.48	-84.41	4.51	4.44	12	477.40	2



SIL: Global X Silver Miners ETF (Daily bars)

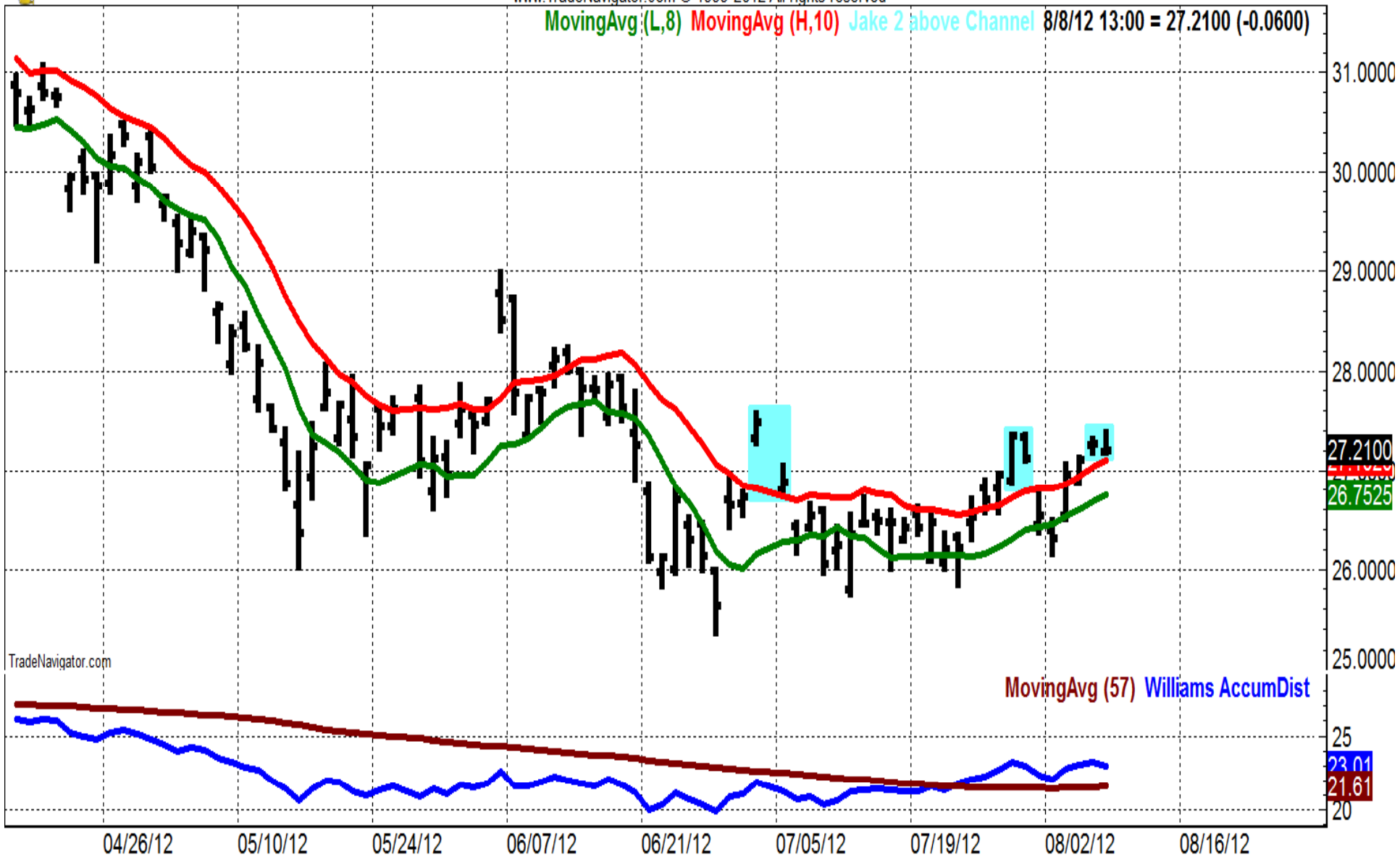
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SLV: iShares Silver Trust (Daily bars)

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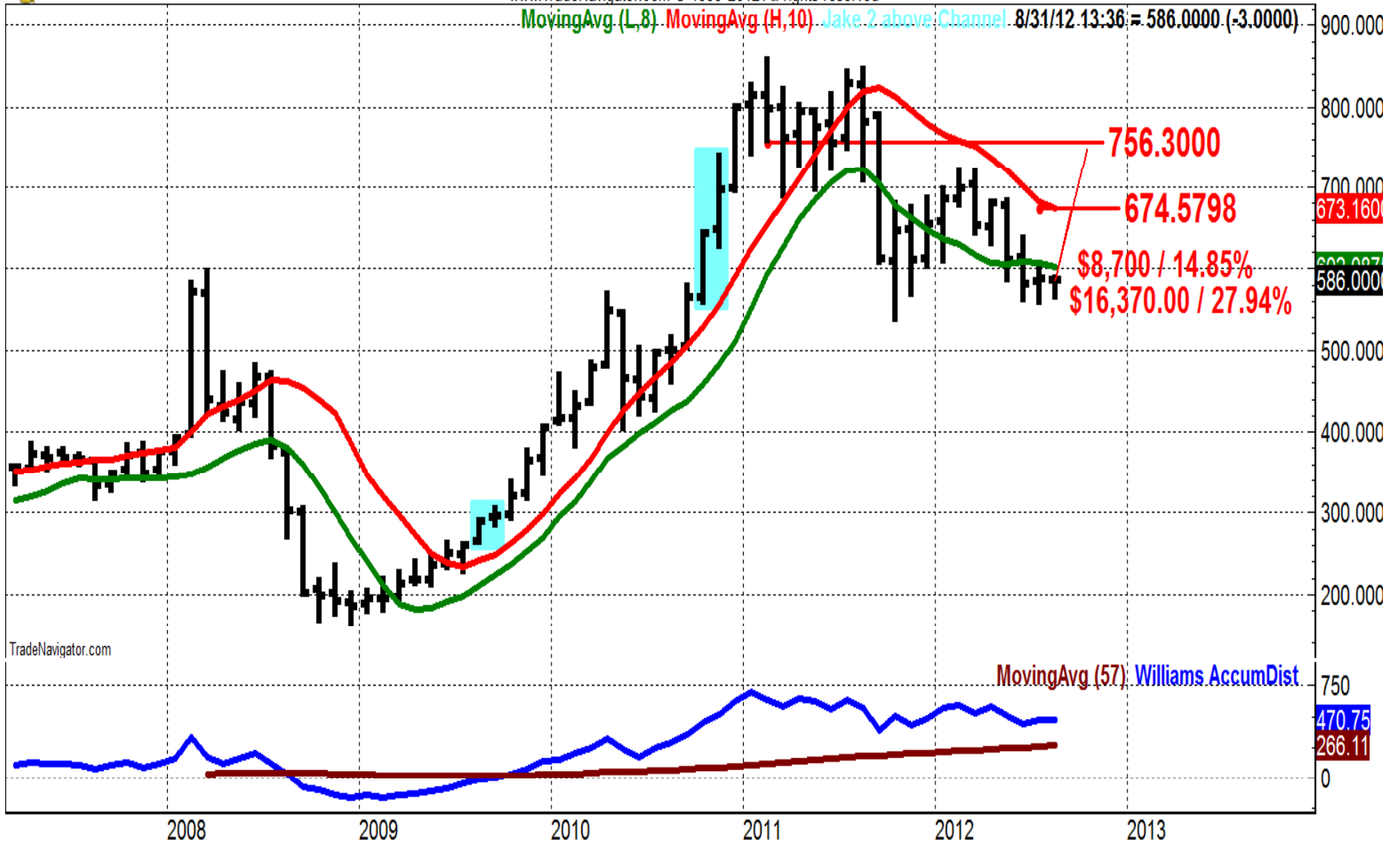


A FEW TARGETS



PA2-055: Palladium (Comb) Cont 1st (Monthly bars)

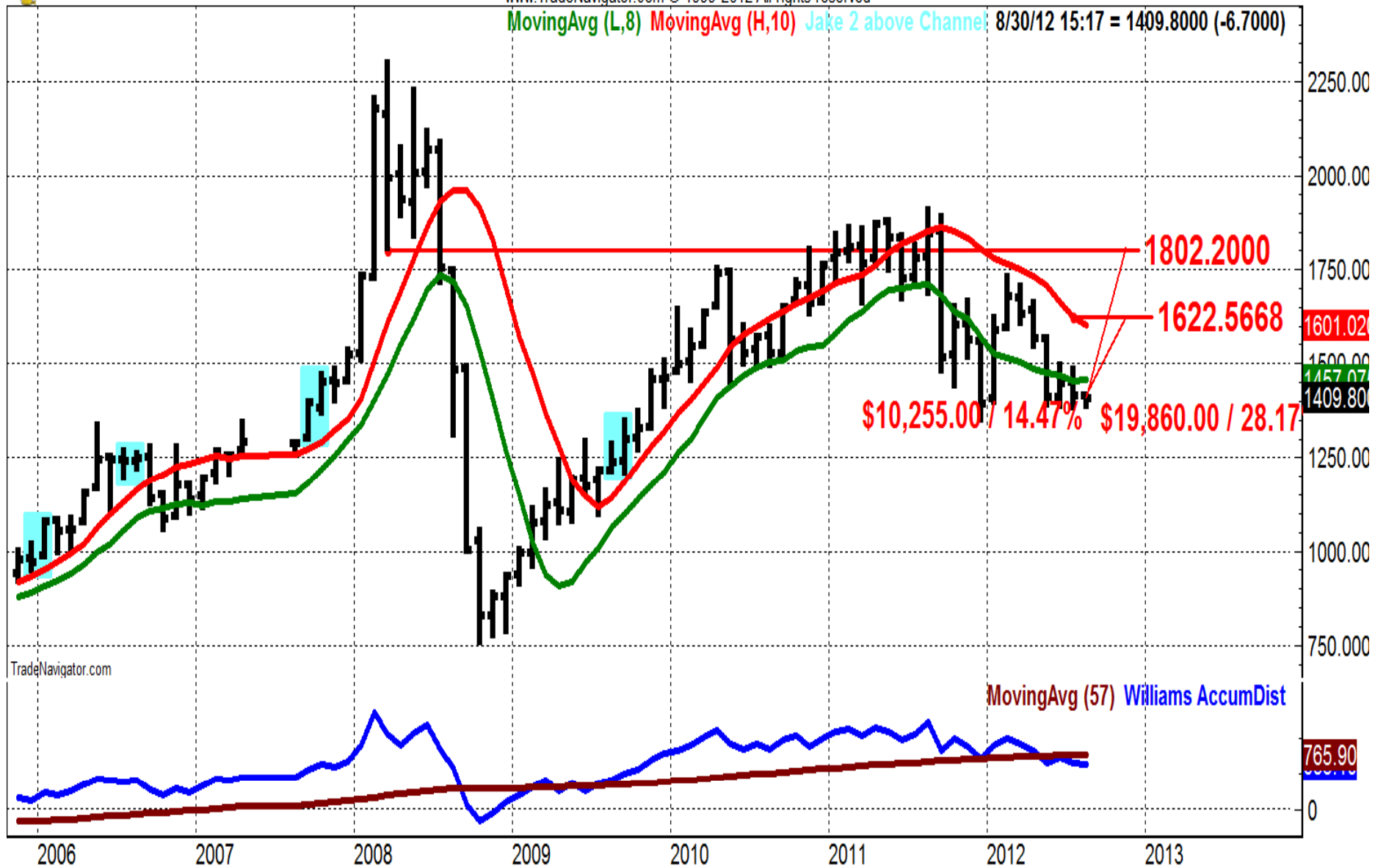
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PL2-055: Platinum (Comb) Cont 1st (Monthly bars)

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SI2-055: Silver Comex (Comb) Cont 1st (Monthly bars)

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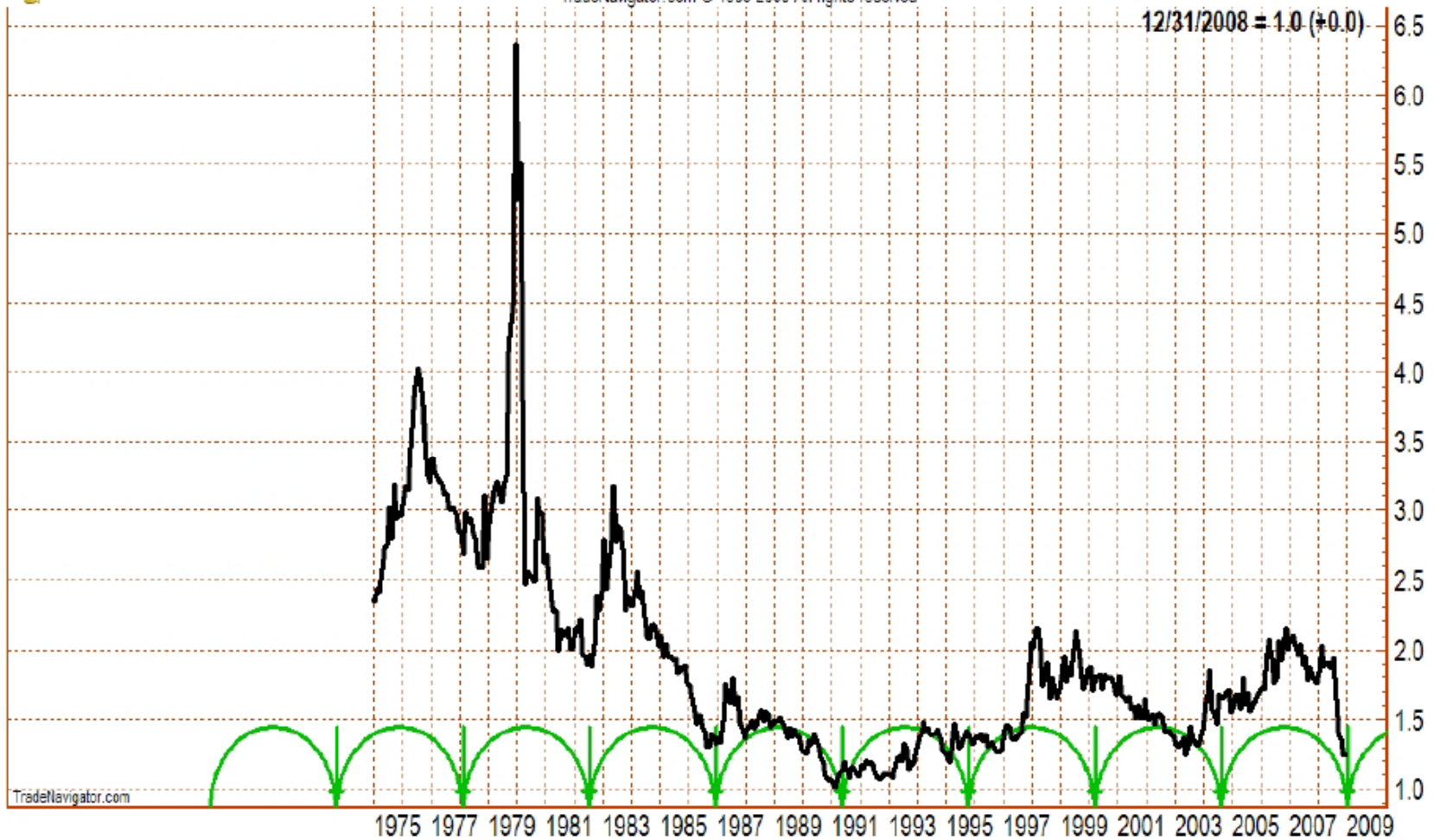
MovingAvg (L,8) MovingAvg (H,10) Jake 2 above Channel 8/30/12 15:20 = 2798.5000 (+4.0000)



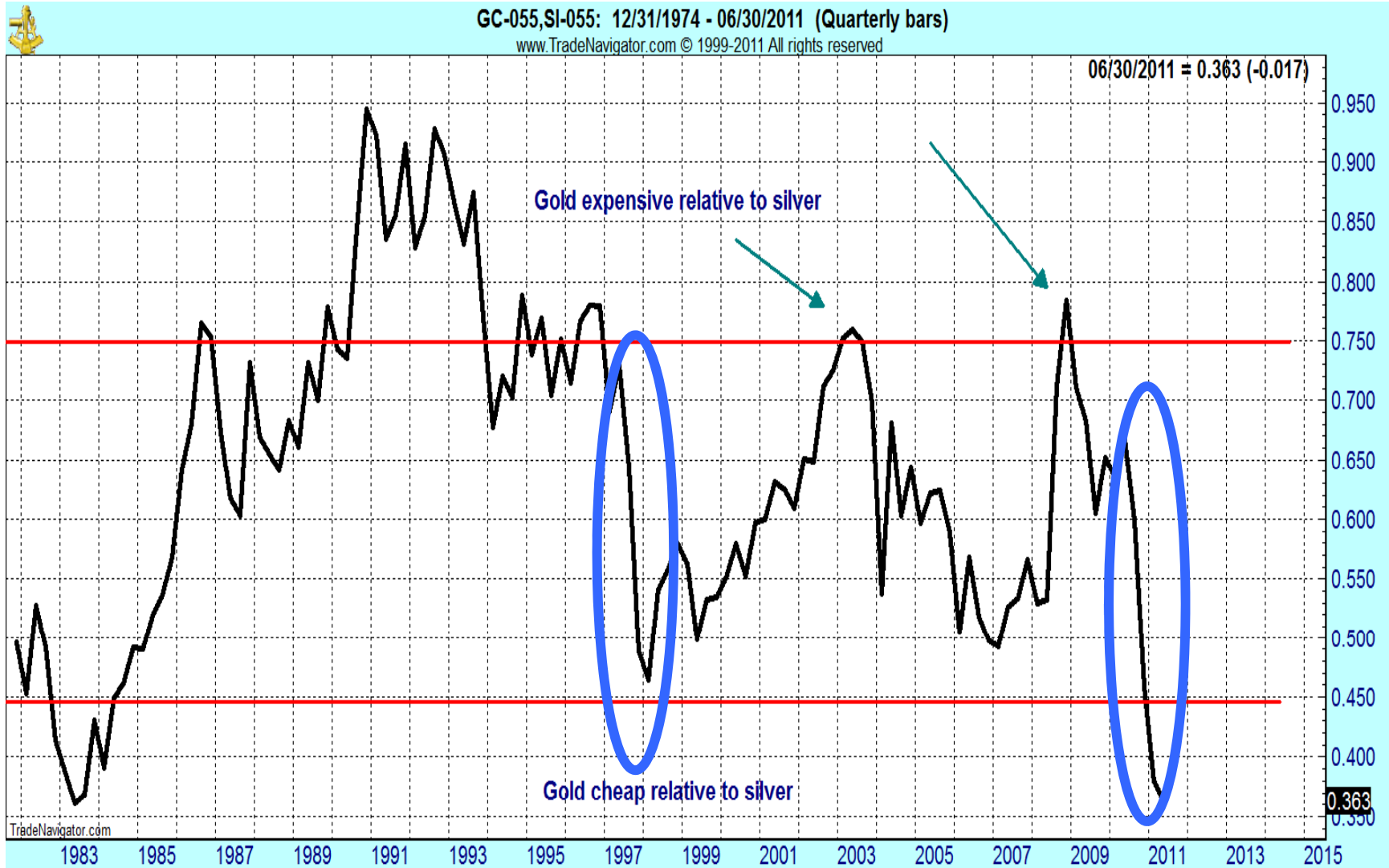
12/08 Silver/Gold Ratio – Is Silver better buy? YES!



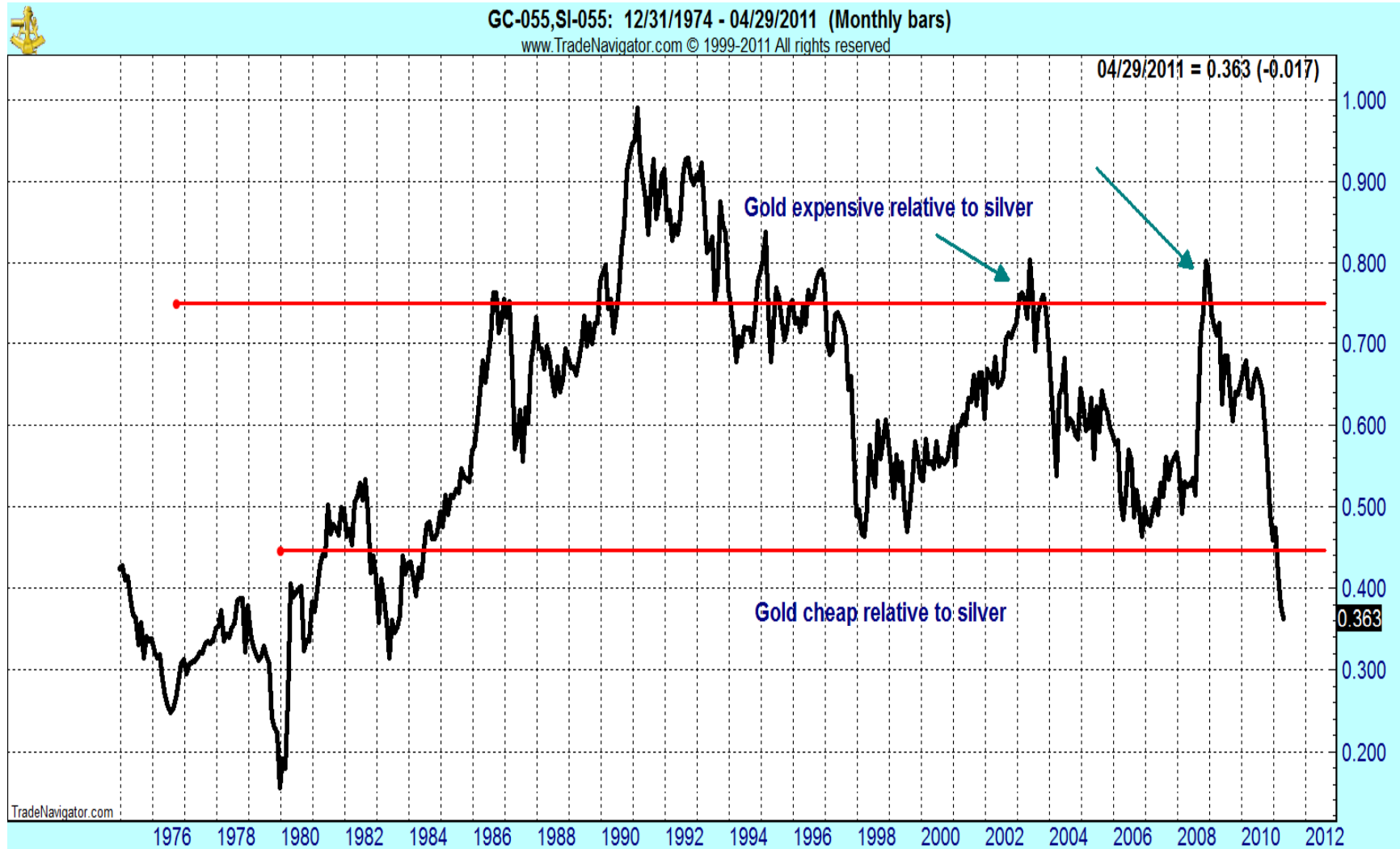
SI-055,GC-055: 12/31/1974 - 12/31/2008 (Monthly bars)
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The silver / gold ratio



A closer look at the ratio



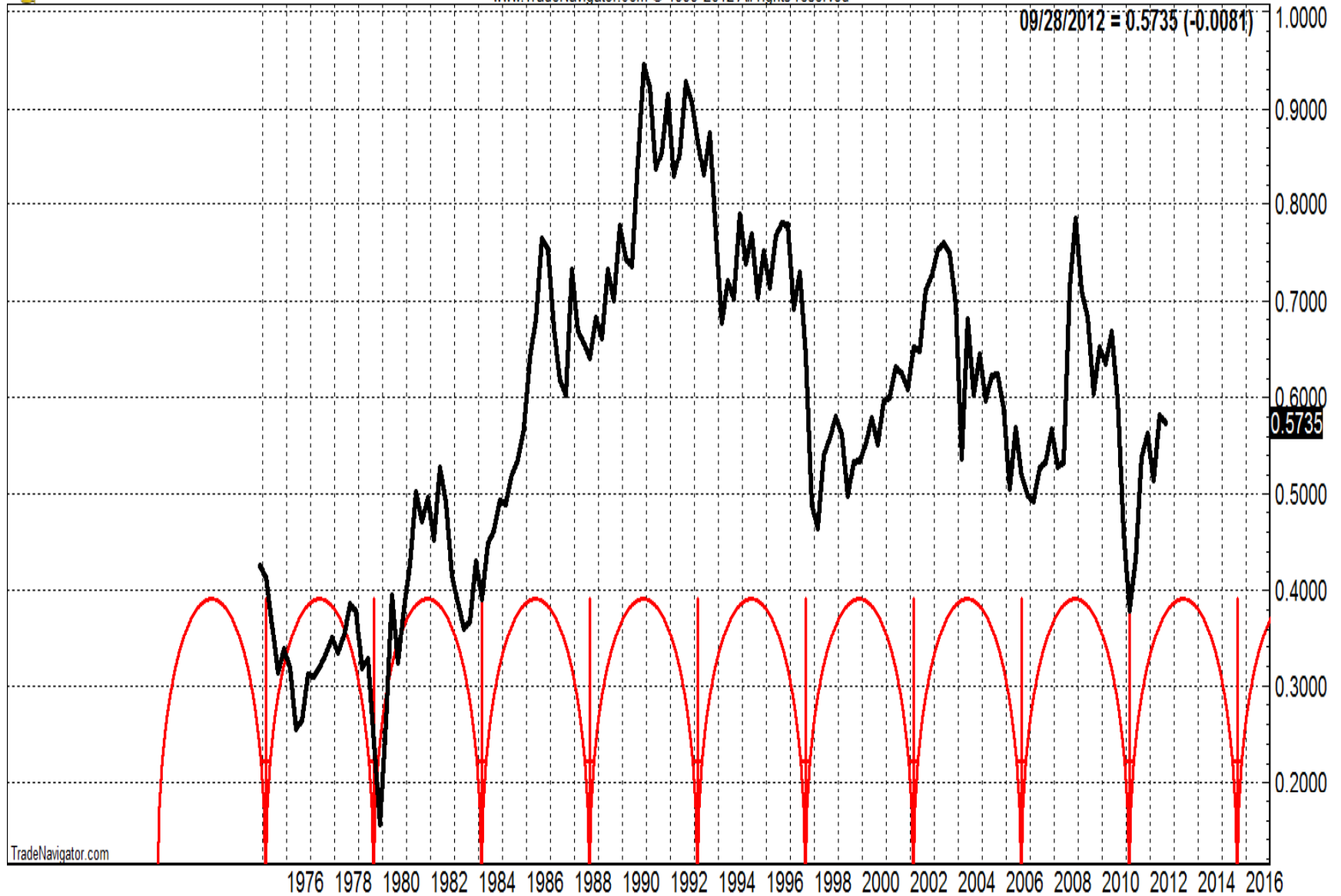
And the cycles-not perfect but





GC-055,SI-055: 12/31/1974 - 09/28/2012 (Quarterly bars)

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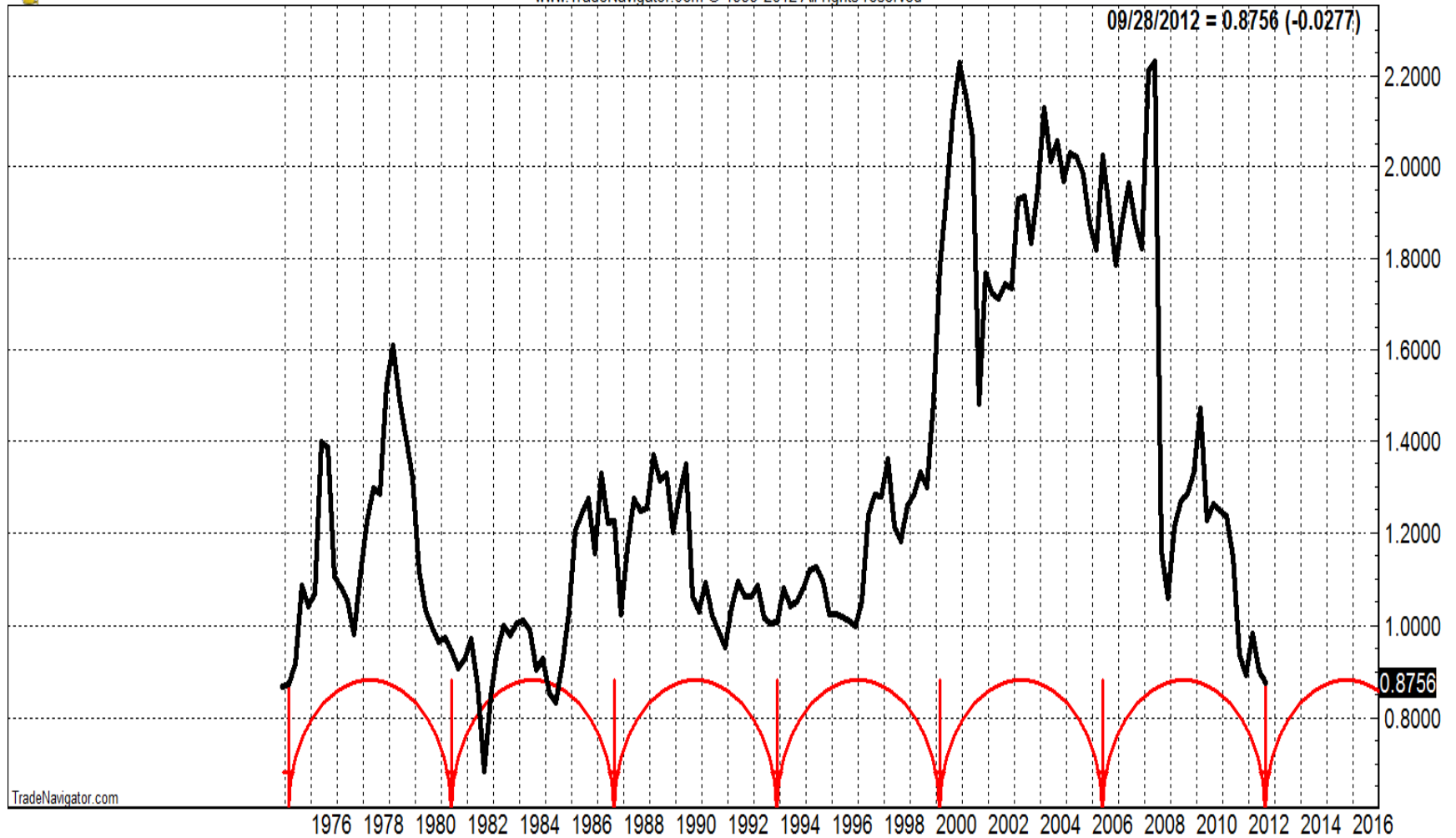


PL/GC



PL-055,GC-055: 12/31/1974 - 09/28/2012 (Quarterly bars)

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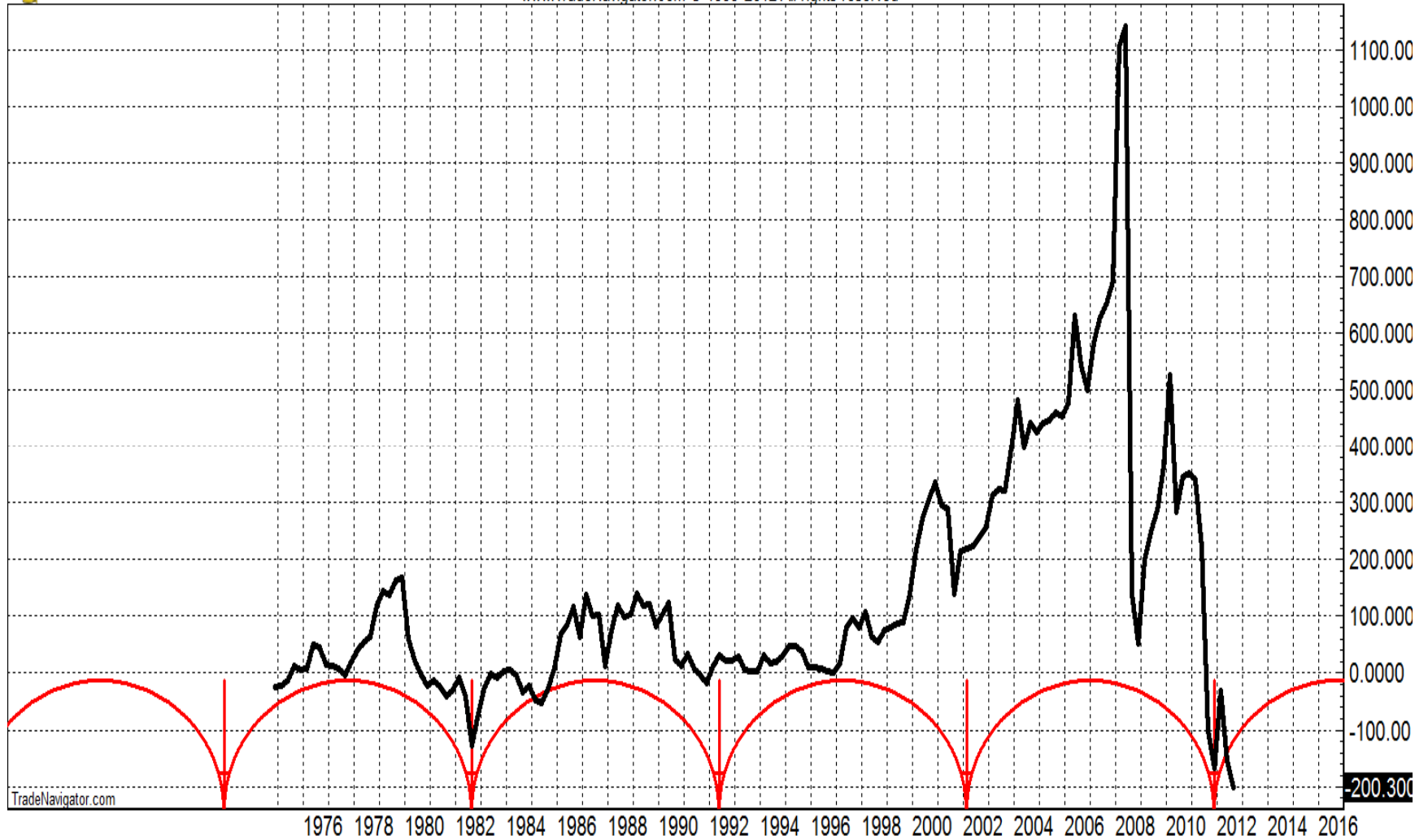


PL-GC



PL-055,GC-055: 12/31/1974 - 09/28/2012 (Quarterly bars)

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Name	Month	L/S	Entry Date	Exit Date	Stop %	P/L Ratio	% Wins	Avg Profit	Avg Loss	% Avg Profit	% Avg Loss	Max Wins	Max Up Swing	Max Loss
Platinum	Jan	L	9/30	10/14	5.00	2.4	70.0	20.4	-20.1	4.11	4.27	9	192.4	3
Platinum	Oct	L	9/12	9/21	100.00	1.6	71.8	14.7	-22.9	2.62	3.81	5	121.5	2

Coins Ingots Bags



[American Gold Eagles
\(2012 & Prior\)](#)



[Gold Bars & Gold Rounds
\(All Sizes & Manufacturers\)](#)



[Canadian Gold
\(Maple Leafs\)
All Canadian Gold](#)



[Gold Buffalo Coins
\(2012 & Prior\)](#)



[South African Gold Krugerrands
\(2012 & Prior\)](#)



[Austrian Gold Philharmonics
\(2012 & Prior\)](#)



[2012 Gold Products](#)



[Chinese Gold Pandas
\(2012 & Prior\)](#)



[Mexican Gold Pesos](#)



[Australian Gold Lunar
\(Series 2\)
2012 & Prior](#)



[Australian Gold Lunar
\(Series 1\)
1996-2007](#)










[Australian Gold Nuggets & Kangaroos
\(2012 & Prior\)](#)

Palladium Bars & Rounds (1 oz - 100 oz)

Have Questions?
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Palladium Bid: 582.50 Ask: 587.50 Change: ▼ -2.20 Updated: 8/8/2012 3:37:42 PM

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Page << 1 >> 16 Items Items per page: 50

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Price Reduced
[APMEX Buy Price - \\$572.50](#)

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Availability: 0
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 **Hot Item**

Currently Out of Stock

When More Come In

Rare earths

- Why? China hoarding
- Limited data history so cycles and seasonals not applicable
- Technicals and fundamentals
- A few stocks to look at
- Charts

REMX fund

Top 10 Holdings

Fund | Index

As of August 07, 2012 | TOTAL CONSTITUENTS: 28

[Download All Fund Holdings](#) 

Holding	Shares	Market Value (USD)	% of net assets
KENMARE RESOURCES PLC KMR LN	19,660,443	12,264,573	7.63%
ERAMET ERA FP	106,945	11,755,668	7.32%
ILUKA RESOURCES ILU AU	1,156,133	11,446,990	7.12%
LYNAS CORP LTD LYC AU	12,572,255	10,044,552	6.25%
ASSORE LTD ASR SJ	254,415	9,244,823	5.75%
TITANIUM METALS CORP TIE US	691,817	8,993,621	5.60%
RTI INTERNATIONAL METALS INC RTI US	368,780	8,961,354	5.58%
MOLIBDENOS Y METALES S.A. MOLYMET CI	526,849	8,845,314	5.51%
HUNAN NON-FERROUS METALS-H 2626 HK	26,486,000	8,545,854	5.32%
CHINA MOLYBDENUM 3993 HK	21,269,000	8,180,575	5.09%

Fund Domicile Breakdown

Fund

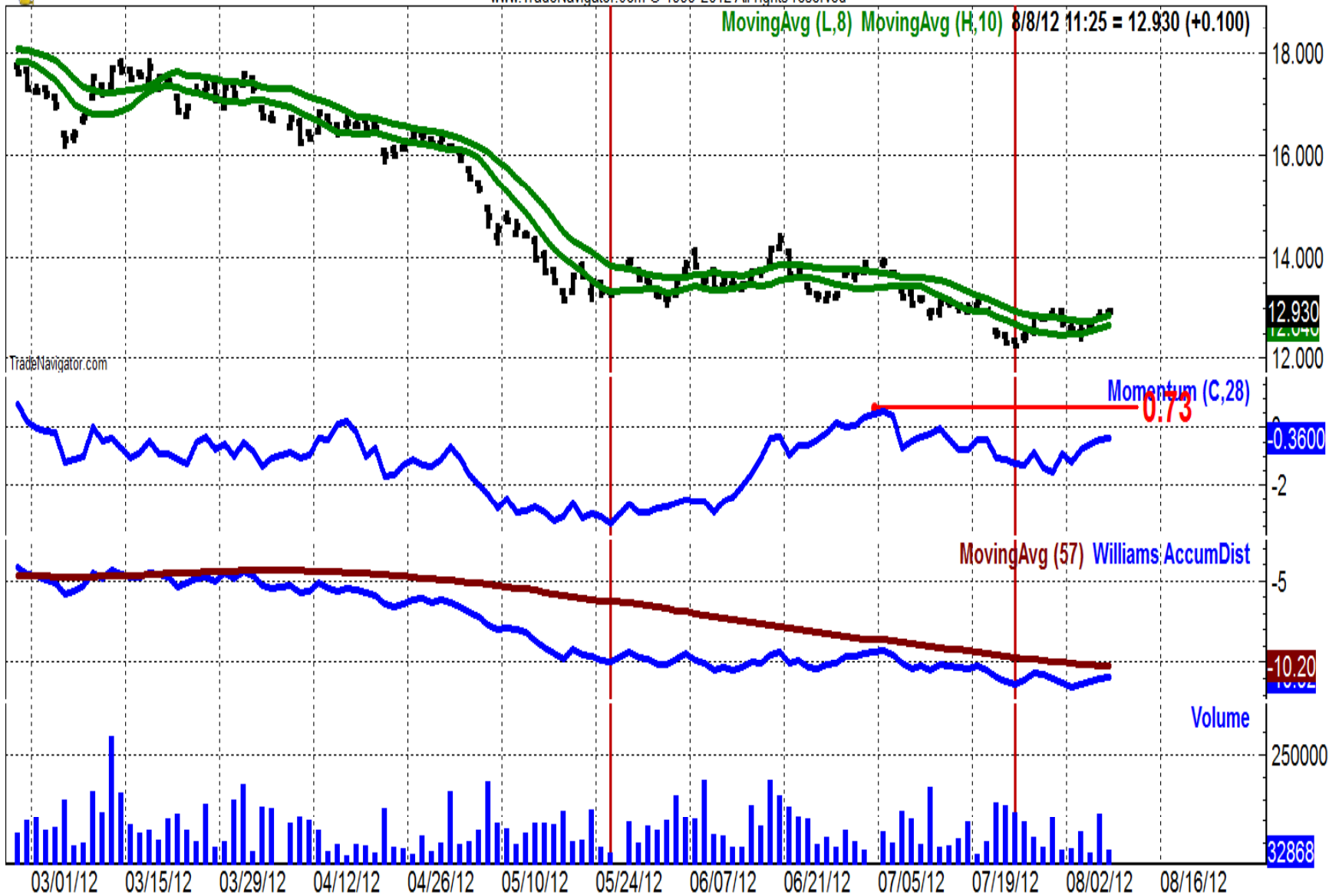
As of July 31, 2012

United States	19.1%
Australia	18.2%
China	12.5%
Canada	11.0%
Japan	8.5%
Ireland	7.2%
France	7.1%
South Africa	5.7%
Chile	5.5%
Brazil	2.7%
Others	2.4%



REM: Market Vectors Rare Earth/Stra (Daily bars)

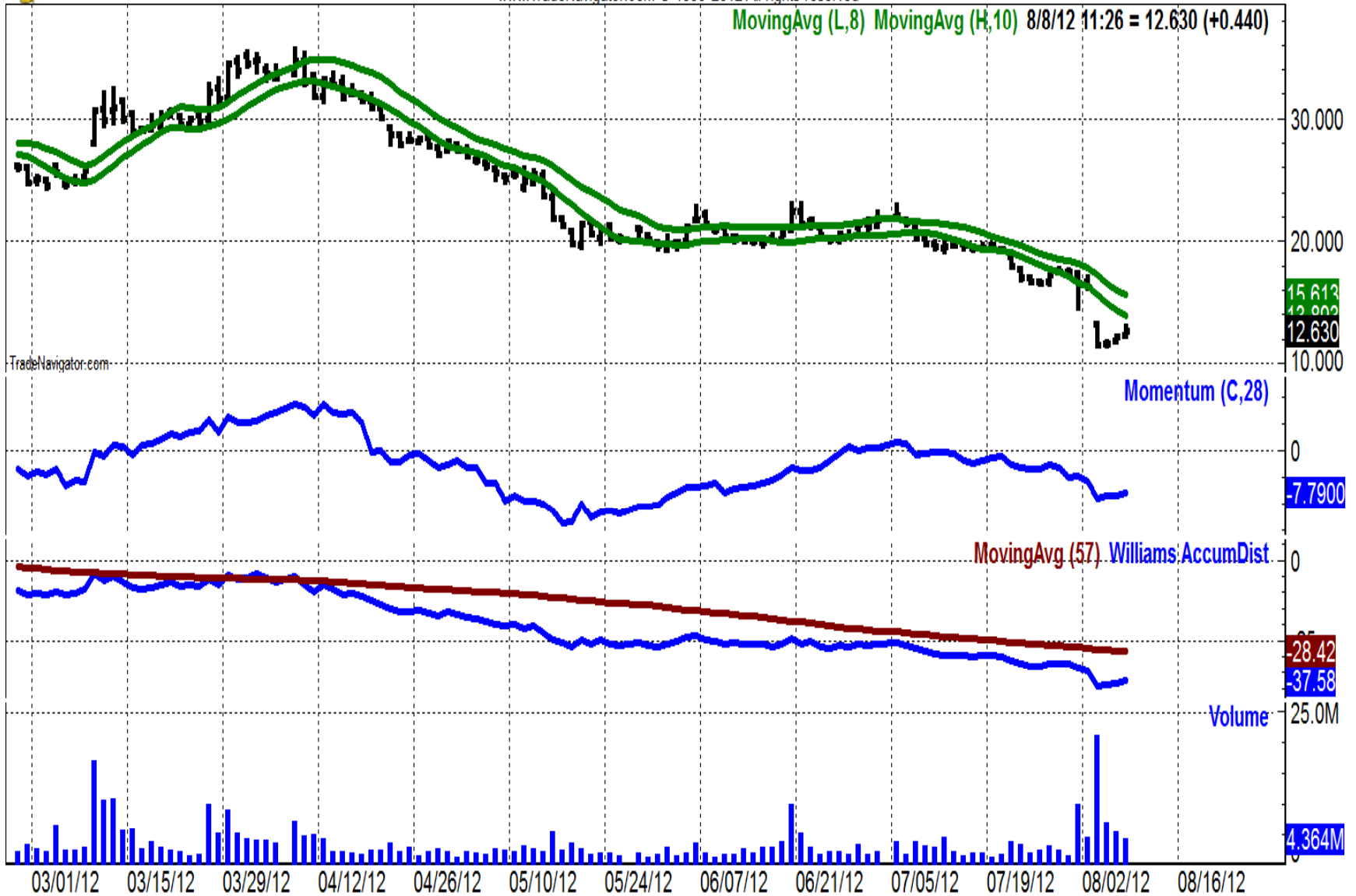
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MCP: Molycorp, Inc (Daily bars)

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Rare earth metals

Lanthanide Series

- [Lanthanum](#)
- [Cerium](#)
- [Praseodymium](#)
- [Neodymium](#)
- [Promethium](#)
- [Samarium](#)
- [Europium](#)
- [Gadolinium](#)
- [Terbium](#)
- [Dysprosium](#)
- [Holmium](#)
- [Erbium](#)
- [Thulium](#)
- [Ytterbium](#)
- [Lutetium](#)

Actinide Series

- [Actinium](#)
- [Thorium](#)
- [Protactinium](#)
- [Uranium](#)
- [Neptunium](#)
- [Plutonium](#)
- [Americium](#)
- [Curium](#)
- [Berkelium](#)
- [Californium](#)
- [Einsteinium](#)
- [Fermium](#)
- [Mendelevium](#)
- [Nobelium](#)
- [Lawrencium](#)

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

I can be reached at 800-678-5253 or 831-430-0600

- Email me if you have questions:
- jake@trade-futures.com
- Best of trading
- **Jake Bernstein**

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