



Mooer stories

Behind Top 10 App Features

Being a customer-focused online trading platform, moomoo is devoted to empowering investors of all kinds to trade like a pro.

The report summarizes 20 cases studies that demonstrates how these various users leverage the key features, as well as what they have learned from their past investing experience.





Preface

Being a customer-focused online trading platform, moomoo is devoted to empowering investors of all kinds to trade like a pro. In addition to delivering an exceptional user experience and financial services to investors, moomoo is dedicated to financial education, helping investors develop critical skills to make rational and informed investing decisions.

The goal of this special report is to showcase users' hands-on experience of using 10 of moomoo's key features to pursue their investing goals. These features include -

1. option trading
2. stock profile and financials
3. stock screener
4. institutional tracking
5. line drawing
6. study plan
7. heat map
8. paper trading
9. industrial chain
10. earnings calendar

These features are either strongly recommended by moomoo's product team, or most used by moomoo users as per data statistics generated in 2022.

To research this special report, we talked with moomoo users, product managers and financial educators and influencers. The report summarizes 20 cases studies that demonstrates how these various users leverage the key features, as well as what they have learned from their past investing experience.

The case studies combine both successful and unsuccessful examples; however, the stories shared by the interviewees may not be representative of other moomoo users and may not be replicable. Any comments or opinions provided by moomoo users are their own and not necessarily relevant to moomoo.

Investing involves risk and the potential lose principal. With this special report, we hope to encourage all investors to make investment decisions based on their own financial needs, objectives, goals, timeline and risk appetite.

All the information comes from the interviewee and is published under the interviewee's consent. The paid testimonials provided herein may not represent other customers' experience, and there is no guarantee of future performance or success. Your experience may be different than the ones represented here. Options trading entails significant risk and is not appropriate for all customers. It is important that investors read Characteristics and Risks of Standardized Options (<https://www.theocc.com/getmedia/a151a9ae-d784-4a15-bdeb-23a029f50b70/riskstoc.pdf>) before engaging in any options trading strategies.

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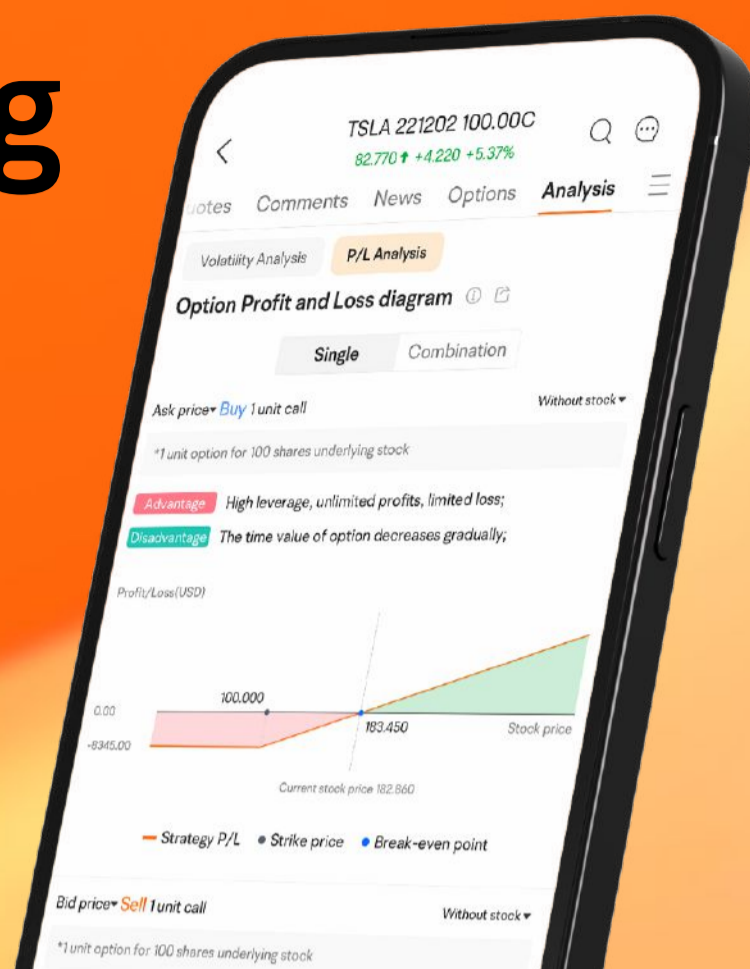
About moomoo

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1. Option Trading

Options can be a useful tool for trading and investing, especially in volatile markets, allowing for leverage, the ability to hedge, and potentially generated income. Options are a tool that can help manage risk exposure of portfolios or individual positions in response to market swings.

*Images provided are not current and any securities are shown for illustrative purposes only.



Case Study 1 - Shine, moomoo's product manager



Shine is more of a value investor now, but his investing strategies are flexible. He does some short-term investing occasionally when he finds proper opportunities.

Key Words: value investor, option investor, long-term investor

Moomoo's product manager Shine kicked off his investing journey five years ago. He believes the market is forever changing and a mature investor should be adaptable and resilient to change.

"In the past year, we saw a nosedive of the market as the external environment deteriorated drastically. In 2021, fast-growing companies and emerging industries were highly sought after, while in 2022, investors are more interested in companies with ample cash flow and stable operation performance." he recalled. "They use tools to assist with decision making more frequently, as they were getting more cautious and pickier."

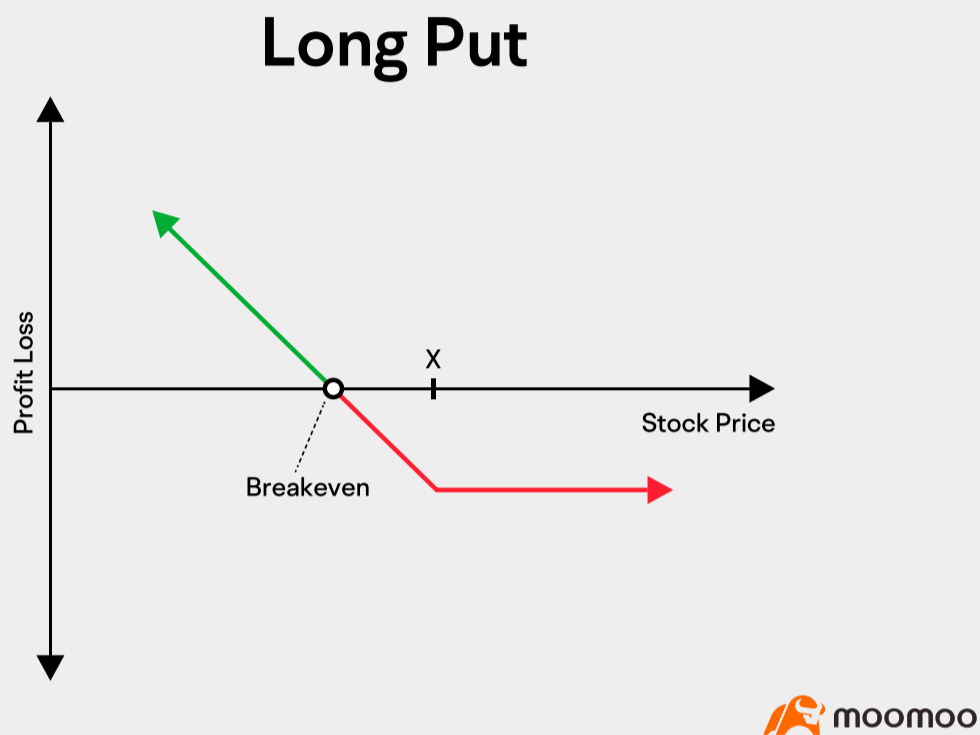
The other important trend he observed in 2022 was the popularity of **option** trading. In a bear market, option trading was highly demanded by investors including Shine to diversify their investments.



Reading Notes - An **option** is a contract which allows its holders to buy or sell a specific quantity of an underlying asset or instrument at a specified strike price on or before the expiration date.

Shine shared an experience of trading options to hedge the potential risk of stock price plummet. After a series of thorough and careful research, he was about to purchase shares of a technology, media and telecom (TMT) company in 2022. But he then found himself in a dilemma, as the company's share price hit a new record high at that moment.

Figure 1 - 1: Long put



"Finding the correct enter point is the key element to success, because nobody wants to buy high and sell low," he said.

"But investors need to fully understand that the market changes rapidly and is almost unpredictable, and it is common that the share price drops after you buy. As a value investor, I do not mind holding certain stocks for a long time. However, if I **buy a put** simultaneously with the transaction, I can offset part of my unrealized principal loss caused by the following price drop because the put theoretically should gain in value if I decide to sell to close the position."



Reading Notes - A **long put** is a position when someone buys a put option. Investors go long put options if they think a security's price will fall, and a long put gives them the right to sell the underlying stock at the strike price.

Case Study 2 - Garit, moomoo's product manager



Garit is a classic technical investor with more than 10 years of investing experience.

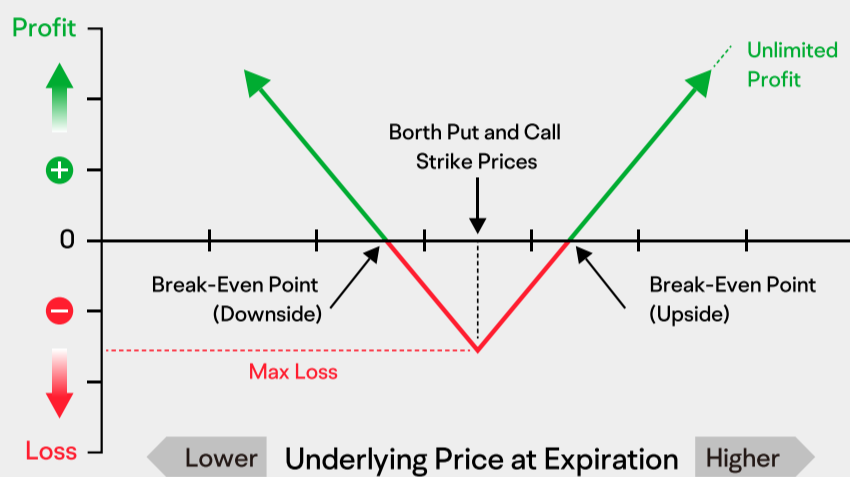
Key Words: technical investor, option investor, short-term investor

Garit joined moomoo's parent company Futu in 2014, one year after the company officially launched. As a seasoned product manager, Garit understands the frontier market and has experienced the development and changing of investing trends.

Comparing the investing trends of 2022 to 2021, Garit said it is more difficult for retail investors to earn money in the stock market, due to inflation concerns, macroeconomic downturns and other factors that exacerbate the market volatility.

Figure 1 - 2 : Long straddle

Long Straddle



"Option trading may provide an alternative for certain investors to help alleviate the impact of the bear market," he said.

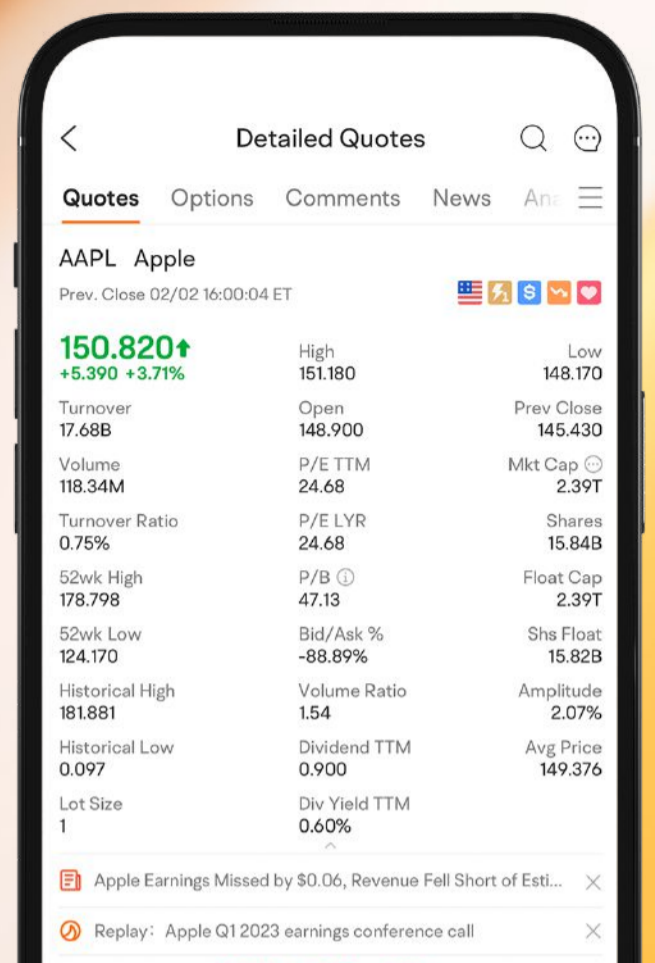
Apart from the original option trading feature, moomoo recently launched the multi-leg option trading feature on mobile end-user devices in the US market to empower investors with more advanced trading ability. With this feature, investors can combine two or more option transactions, or "legs" in trading strategies, which allows them to simultaneously buy and/or sell the legs aimed to achieve a certain investment goal.

"For example, a common multi-leg option order - called a long straddle - is comprised of buying both a put option and a call at the same strike price and expiration date. Investors hope to profit from large price movements with a long straddle, rather than suffer from the volatility," Garit said. "Once you fully understand the concept of options, learning to use multi-leg option trading should not be too difficult."

2. Stock Profile and Financials

Stock valuation is critical for investing. To value a company, investors need to learn the information about it, such as business model, competitive advantages and growth potential. Investors have access to relevant information via moomoo's stock profile & financials feature.

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Case Study 1 - RJBoy, a US moomoo user



RJBoy works in the construction industry and lives in West Palm Beach, Florida. He is a momentum trader with 6 years of investing experience.

Key Words: momentum investor, short-term investor

After gaining profit from the **stock split** of an electric vehicle (EV) maker in 2020, RJBoy, a US moomoo user, has achieved some milestones in his investing career. He shared what he had learned from investing in a stock split with moomoo.

"I realized taking profits in such company actions could make investing more efficient than simply holding the stock for a long time," he said. "Normally I treat a stock split as a positive signal of future growth because the company is issuing more shares to attract more investors. Generally, the company takes such an action in good market conditions to increase its liquidity. Because I rode this momentum, I gained profits after purchasing the EV shares."

Since then, RJBoy keeps monitoring financial data and other actions related to the companies in his portfolio closely. Every week, he follows those companies' earnings calls and announcements, especially those regarding institutional investors' activities. He proactively researches this information via various news

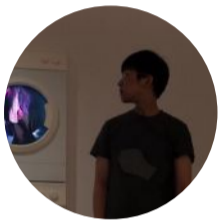


Reading Notes – A **stock split** is a corporate action in which a company issues additional number of shares to shareholders. The purpose of a stock split is normally to boost the stock's liquidity.

outlets, blogs, newsletters and moomoo app. He also tries to expand financial knowledge through moomoo's study plan feature, and he is taking courses related to options now.

"I am definitely more confident after reading and understanding specific market events." he said. " I am sure that studying financial and investing topics makes me better at investing."

Case Study 2 - Jason, moomoo's product manager



Jason is a seasoned value investor who has solid financial background.

Key Words: value investor, long-term investor

As a resolute proponent of value investing, moomoo's product manager Jason believes that a company's financial and operation data are the most important and relevant reference to investors.

He highlights two advantages about moomoo's stock profile and financials page. First, the information and insights provided in the moomoo app are comprehensive and updated. With a dedicated team regularly updating the data, moomoo provides information collected from highly reliable and timely sources including shareholder calls that are not always available to retail investors.

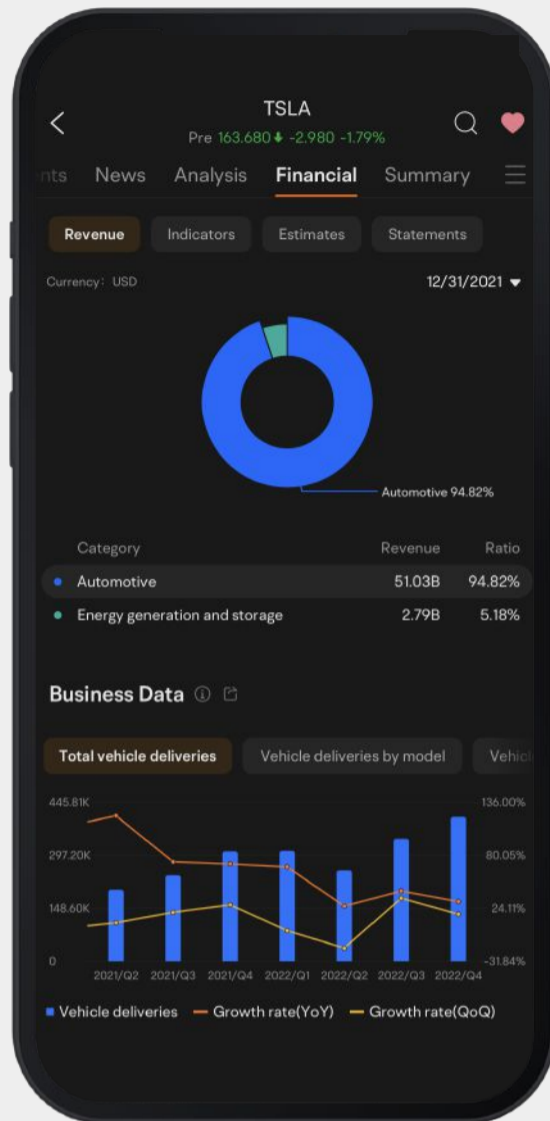
Second, moomoo's product team works towards the goal of helping users easily visualize the data, presenting it via charts and graphics to improve users' understanding.

Apart from the regular financial data, Jason highly recommends the "**business data**" function to value investors. It includes information such as total vehicle deliveries of a car manufacturer, the daily active users of a social media company, the gross merchandise value of an e-commerce platform and more. Business data represents the operation and the performance of a company's main business and is very helpful to fundamental analysis of individual stocks.



Reading Notes - **Business data** of individual stocks helps users understand the operation and value of a company in-depth. Moomoo's business data feature now covers 120 listed companies across various markets.

Figure 2 - 1 : Business data



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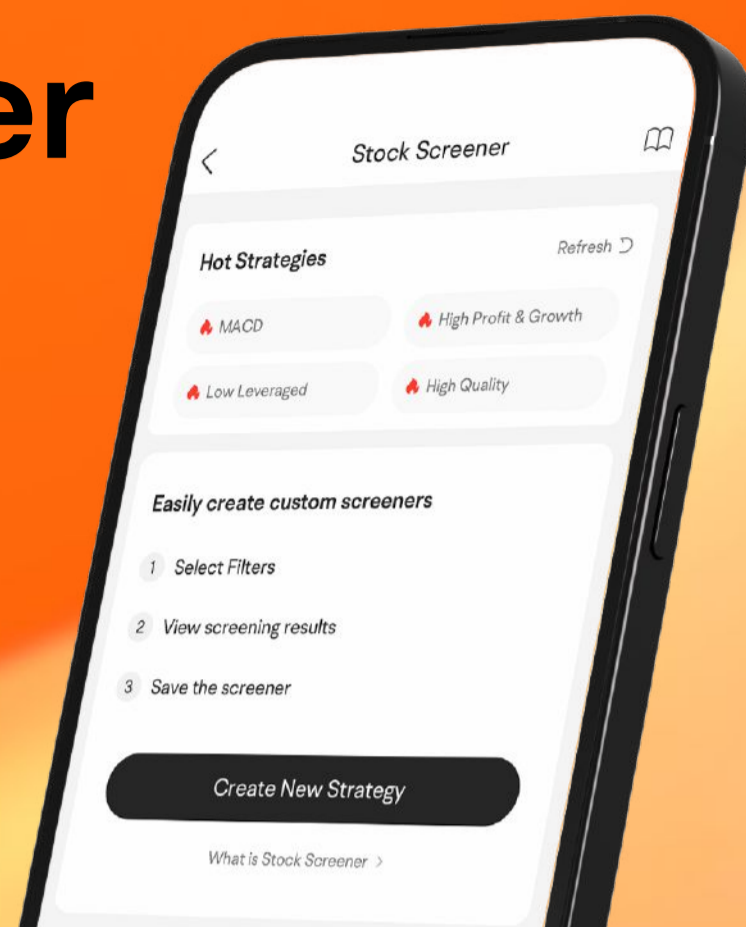
With a solid background in finance and investing, Jason developed his own method to value a company. He regularly collects financial and operation data for his target companies and builds separate spreadsheets with Excel.

"Normally I will have five to 10 companies on Excel spreadsheets. I update the variables and monitor their actions and developments," Jason said.

In addition to the key data released quarterly from company earnings, he follows the company's announcements about mergers, acquisitions and financing. "As a value investor, I only trust the company announcements, statements and official documents. I understand that investors receive tons of market rumors every day, but I never take them into consideration when making my investing decisions. As a long-term investor, I am extremely cautious about information that is not clarified," He added.

3. Stock Screener

Stock screener allows users to define the criteria that fit their own investment objectives by enabling investors to filter out stocks and their favorite ones.



Case Study 1 - Joseph Hogue, CFA, a personal financial educator



Joseph is a formal investment analyst. He is a value investor and long-term investor.

Key Words: value investor, long-term investor

Investors can find over 10,000 symbols such as stocks and **ETFs** from Singapore, US, Hong Kong SAR and more on moomoo. However, with limited funds and amount of time, retail investors typically only buy a few stocks for their portfolio.

"Warren Buffett might have dozens of analysts on the payroll so he can look through more than 700 stocks. But for retail investors including me, we need to narrow down the stock list before we start doing research," said Joseph Hogue, CFA, who used to work for some of the largest private investors as an investment analyst, and is now a personal financial educator as well as moomoo user.

Joseph showed us a basic way to quickly cut the stock list down, leveraging the stock screener feature on moomoo. As a value investor, he recommended four matrixes – **P/E ratio** , operating margin, dividend yield and debt equity ratio.



Reading Notes - An **Exchange Traded Fund (ETF)** is an open-end fund that can be bought and sold on a stock exchange. It can be actively managed, seeking to outperform a market index; or passively managed, seeking to match the performance of a market index.



Reading Notes – **P/E ratio** is used to determine the relative value of a company's shares. It is calculated by dividing share price by earnings per share.

1

Select stocks with P/E ratio below 50x

- “The natural place to start is to pick stocks with their P/E ratio”
- “It will cut the list down to almost a third”

2

Add operating margin to the filter

- “It is my favourite matrixes of profitability and management efficiency”

3

Add dividend yield as one of criteria

- “Because I am a big believer of dividend!”

4

Don't forget debt equity ratio

- “One trap in value investing that we should pay extra attention to is the companies with too much debt.”
- “Remove them from your list with this ratio!”

If there is still a large basket of stocks left on the list, Joseph recommends an even simpler solution to value investors – a customized indicator on the moomoo app that navigates them directly to the stocks held by various institutional investors. These investors can explore if some of the biggest names hold any of the stocks in their screener.

Case Study 2 - Shine, moomoo's product manager



Shine is both a day trader and a value investor with over four years of investing experience.

Key Words: *value investor, long-term investor, intraday trader*

“We added various matrixes to the stock screener feature, making it not only useful to beginners, but also veterans.” Said Shine, moomoo's product manager of the stock screener feature.

“I opt for day trading amid market volatility, but my strategies are flexible and largely dependent on the market conditions and evolution. The matrixes that interest me the most will be those related to stock amplitude.”

Two important indicators he references are **turnover** over the past few days and P/E ratio, but traders can use other indicators as well depending on their objectives and goals.

Once the feature uses your selections to filter out certain stocks, traders can then screen each candidate one by one and select one to trade. At this stage, Shine will carefully examine these stocks' price curve, checking if there are signals that might breed potential bounces.

“I recommend users learn more about different matrixes as they can provide enormous useful information and opportunities,” Shine said. “However, one should always bear in mind that day trading is highly risky. Make sure you understand and manage the risks in the whole process.”



Reading Notes - **Share turnover** measures a stock's liquidity. It is calculated by dividing the total number of shares traded during some period by the average number of shares outstanding for the same period. The higher the share turnover, the more liquid company shares are.

Case Studies 3 and 4 - SpyderCall and Trade The Trader



SpyderCall, a US moomoo user
He is a full-time trader and a technical investor in Texas.



Trade The Trader, a full-time content creator and stock market trading educator in Canada
He is a momentum trader who relies heavily on technical indicators.

Key Words: *technical investor, momentum investor, short-term investor, intraday trader*

Full-time proprietary trader and moomoo user SpyderCall makes most of his investment decisions based on a company's technical aspect and its past price action.

"I pay more attention to ticker symbols when their price is crossing above the technical moving average or experiencing technical bounces in price action," SpyderCall said. "Stock screener is probably the feature that I use the most on moomoo. I use it every day."

The stock screener feature can quickly identify stocks that have abnormally high volume or unusual movements in price, where investing opportunities might exist. He has created a list of over 50 strategies combining various filters with the stock screener function. Most of the matrixes are from the "Technical" drop list, such as **KDJ**, MACD, BOLL and RSI.

Trade The trader, a momentum trader with over six years of investing experience, considers moomoo a different player among so many other investing apps. He found moomoo offers more customized indicators and matrixes on its stock screener and other features that are mainly used by veteran investors.

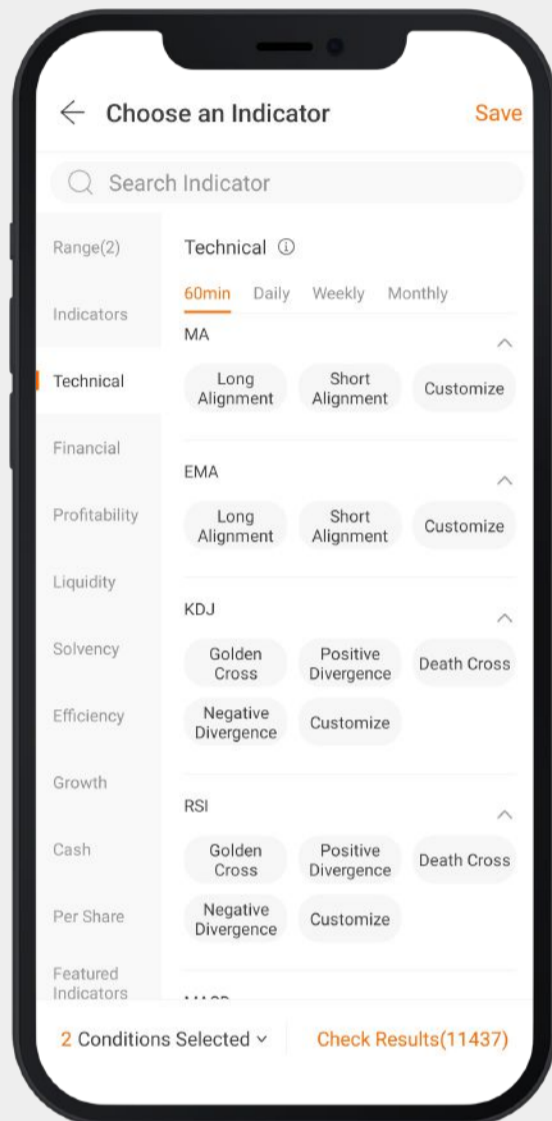
Trade The Trader highlighted a unique indicator that he finds very useful - the positive divergence.



Reading Notes – **KDJ**, also known as random index, is a technical index widely used in short-term trend analysis of futures and stock markets. KDJ reflects the intensity of price changes, signals of overbought and oversold.

"A positive divergence means although the stock price is still on a downwards trajectory, it will potentially move into an uptrend. As a momentum trader, I strongly believe the market is sentiment-driven, and the stock price moves up and down on what other traders think is going to happen. Featured indicators like positive divergence allow traders like me to trade the stock based on market sentiments," he said.

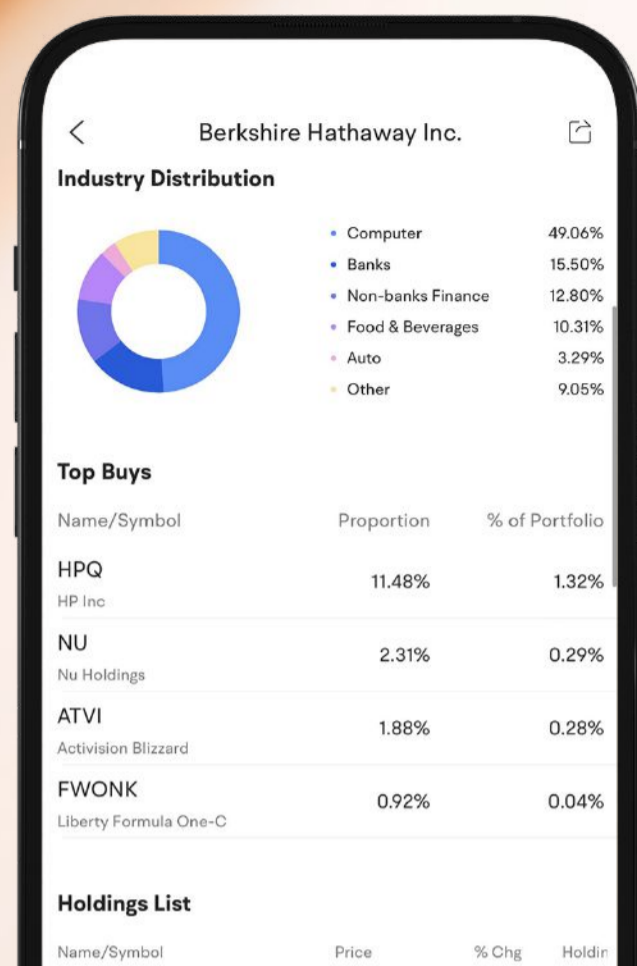
Figure 3 - 1: Technical Indicators on moomoo stock screener



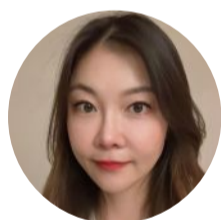
4. Institutional Tracking

Institutional tracking helps users track the portfolio movement of more than ten top investment managers, such as Warren Buffett's Berkshire Hathaway, Bill Ackman's Pershing Square, Ray Dalio's Bridgewater, Cathie Wood's ARK Investment and so on.

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Case Study 1 - Jojo, an insurance agent and YouTube influencer



Jojo is a long-term investor with one-year stock investing experience in Los Angeles.

Key Words: *value investor, long-term investor*

As a novice of stock investing, Jojo shares skills that she finds useful for investing beginners on YouTube.

Jojo sees herself as a swing investor and value investor. Her investment strategy is watching the economic trend, sitting on a cash stash when the market is at its highest, and waiting for the downturn in the market to fall to buy at low valuations.

To improve her skills, Jojo closely follows news of investing masters like Warren Buffett and Cathie Wood, as well as the funds they manage. Buffett, as a faithful value investor, has held a large amount of cash in the previous years. On the contrary, Wood's Ark Invest has maintained a relevantly low cash balance. The application of various investing strategies provides a wealth of information and knowledge for investors to learn from.

Jojo was curious to know more about Buffett's portfolio, and moomoo's **institutional tracking** feature offered a tool to help with that.



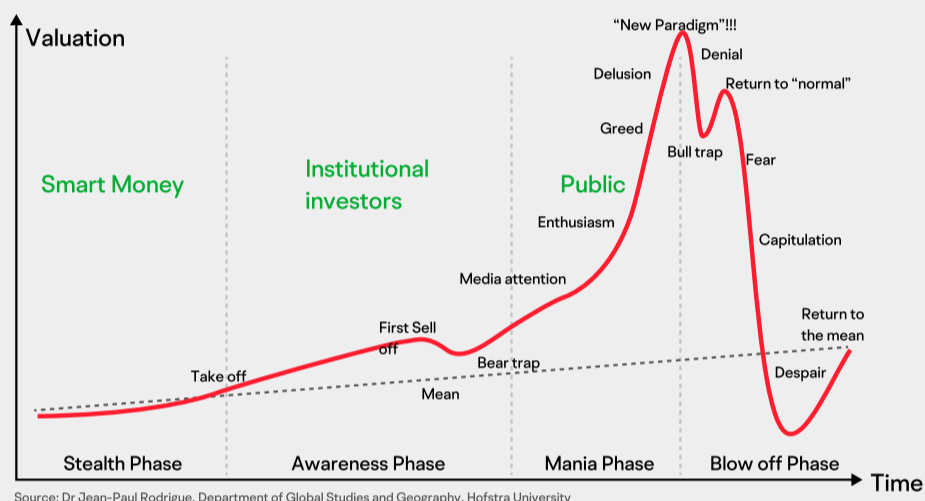
Reading Notes - The information regarding Institution investors' portfolio holdings is delayed, since according to 13F, institutional investors only reveal their portfolio holdings quarterly.

"The feature showed me that Buffett had recently bought shares of Occidental Petroleum. Check the price chart, you will see that the company had saw a rally in the market since Buffett's purchase of the shares." She added.

Jojo further explained why she considers it necessary to know Buffett's action with Dr. Jean-Paul Rodrigue's Psychology of Bubbles theory. According to the theory, institutional investors enter the market before the bubble blows. After institutional investors buy a stock, it is likely the stock will attract media attention, thereby triggering an influx of the masses, and after reaching a new paradigm, it will reverse to the mean.

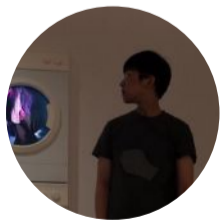
Figure 4 - 1: Psychology of Bubbles theory

Psychology of Bubbles Theory



She found similar patterns on the price curve of S&P 500, Nasdaq Index, and some ETFs in the past a few years.

Case Study 2 - Jason, moomoo's product manager



Jason previously worked for a fund house and is a value investor.

Key Words: value investor, long-term investor

Moomoo's product manager Jason, who majored in Finance in college, is a seasoned value investor with over eight years of investing experience. He thinks the institutional tracking feature also provides insights to veteran investors.

With years of investing experience and solid financial background, Jason develops unique methods to value a company. His investing decisions are based on his expected value of the company, as well as the price of its shares.

As a long-term investor, Jason does not change his portfolio frequently. Therefore, lowering the cost of his investments in the long term is important to him. To better gauge whether his cost is high or low, Jason refers to institutional investors and refers to moomoo's institutional tracking feature.

With this feature, Jason closely follows the actions of big market players who hold the same shares as he does. He checks those funds' portfolio from time to time on moomoo, especially after the release of **13F documents**, which are quarterly reports filed by investment managers to disclose their US equity holdings to regulators.

“Generally institutional investors do not post the average cost of their positions, but we can roughly estimate it through their actions in the market. Are they in a long or short position? What is the transaction price range? The result of such estimations is a critical reference and clue to me. Meanwhile, this is a way to sense the market and sharpen my financial acumen.”



Reading Notes -
Moomoo updates the institutional investors' investment holdings mainly based on open market data such as **13F filings**.

5. Line Drawing

Line drawing tools in technical analysis help investors analyze price movements to identify possible buy or sell opportunities. Moomoo provides drawing tools with 29 kinds of in-built chart patterns on the desktop version, and 22 kinds of chart patterns on the App version.



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Case Study 1 - Garit, moomoo's product manager



Garit is an experienced technical investor.

Key Words: *technical investor, short-term investor*

Moomoo's product manager and experienced technical investor Garit recommends moomoo's line drawing feature to users who share the same passion for technical investing.

"We built this feature from scratch upon request from moomoo users four years ago. The feature now comprises over 30 line-drawing tools including **Elliott Impulse Wave**, Head and Shoulders, Gann and Fibonacci Tools, Channel line and so on. It is one of my more widely used features on moomoo," Garit said.

To demonstrate how the line drawing feature helps him analyze the movement and read the market, he gave an example of a tech company that saw its stock price bounce in early December, 2022.

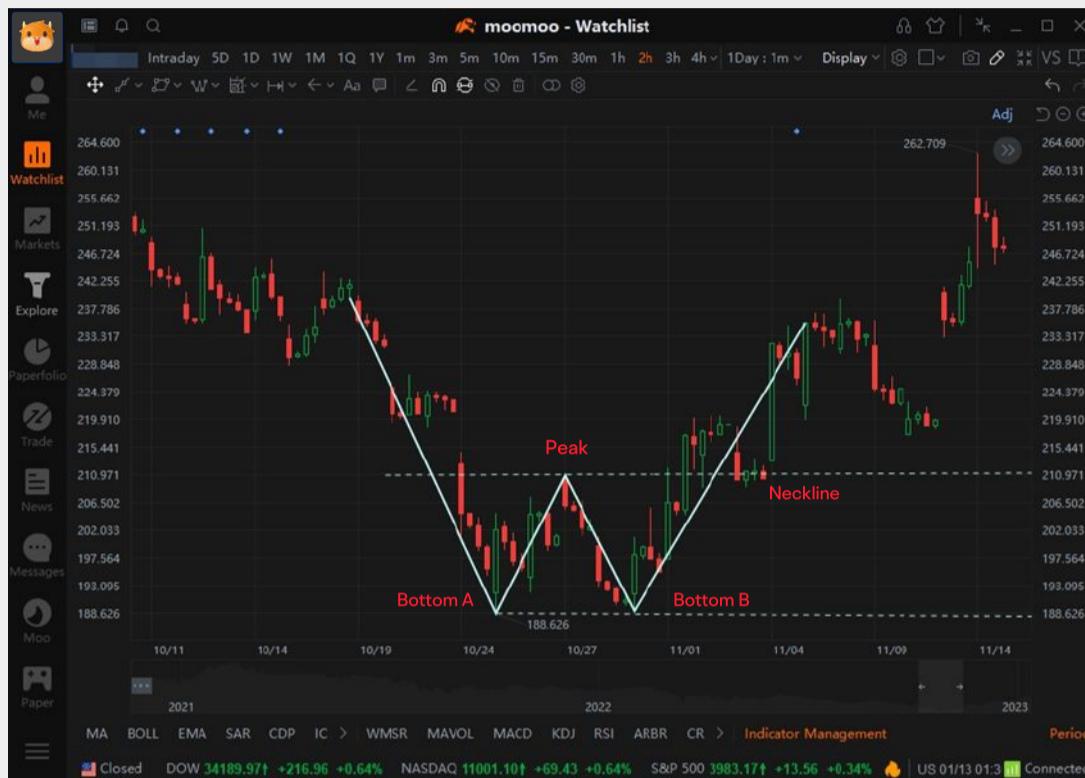
"In a classic technical investor's opinion, a twice-touched low of a price movement becomes a support level, and efficiently signals the change in the trend direction. This tech company is one of the benchmarks in the industry, and I



Reading Notes – An **impulse wave pattern** is an indication of a strong move in a financial asset's price coinciding with the main direction of the underlying trend. It is used frequently by adherents of Elliott Impulse Theory.

monitor its price movement closely. A few months ago, its stock price jumped amid a market rally and that was when I noticed the double bottom pattern."

Figure 5 - 1 : Double Bottom Pattern



He first identified two bottoms that were almost at the same price level, which were the left shoulder and the right shoulder. He then found a peak between the two bottoms. Simply adding a neckline to the chart, which represents the resistance level, a W shape clearly emerged.

"The logic is very straightforward. Once the pattern is triggered and if the price breaks through the neckline, or the resistance level, it can potentially enter the profit-take session. In the same vein, a stop-loss order should be placed if the price remains below the neckline. A volume spike occurring during the two upward price movements also indicates strong upward price pressure and provides another signal of a double-bottom pattern," Garit said.

"But investors have to be extremely cautious when utilizing these techniques for real investing," He emphasized. "One could easily identify the wrong peak or wrong bottom. And sometimes, the price movement ends up with one more bottom. To be honest, stories like this happen all the time, even on veterans like me."

Case Study 2 - SpyderCall, a US moomoo user



SpyderCall is a full-time proprietary trader in Texas. He is a technical investor.

Key Words: *technical investor, short-term investor*

SpyderCall, a moomoo user and technical investor, shared another example of using drawing tools in technical investing - bearish continuous diamond, which is often regarded by technical investors as a sign of bearish market, signaling a possible extension of a downtrend. The pattern appears when the price generates higher highs and lower lows at first, and then the price oscillation amplitude gets smaller and finally reaches the break of support.

SpyderCall found this pattern on the candlestick charts of a biotechnology company (Company A) and a financial service corporation (Company B) amid the market volatility during the first half of 2022.



Reading Notes -
Learn more about
SpyderCall's sharing
about Bearish
Continuous
Diamond -
[https://
www.moomoo.com/
community/
feed/109204345914
561](https://www.moomoo.com/community/feed/109204345914561)

Figure 5 - 2 : Company A

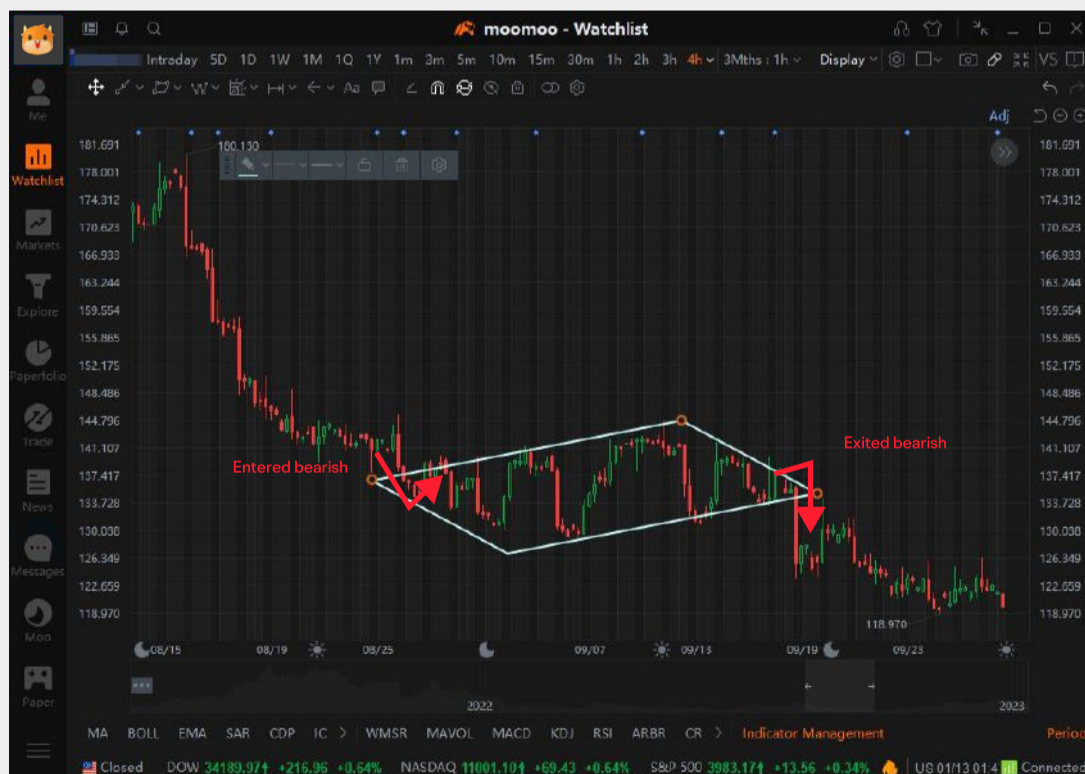
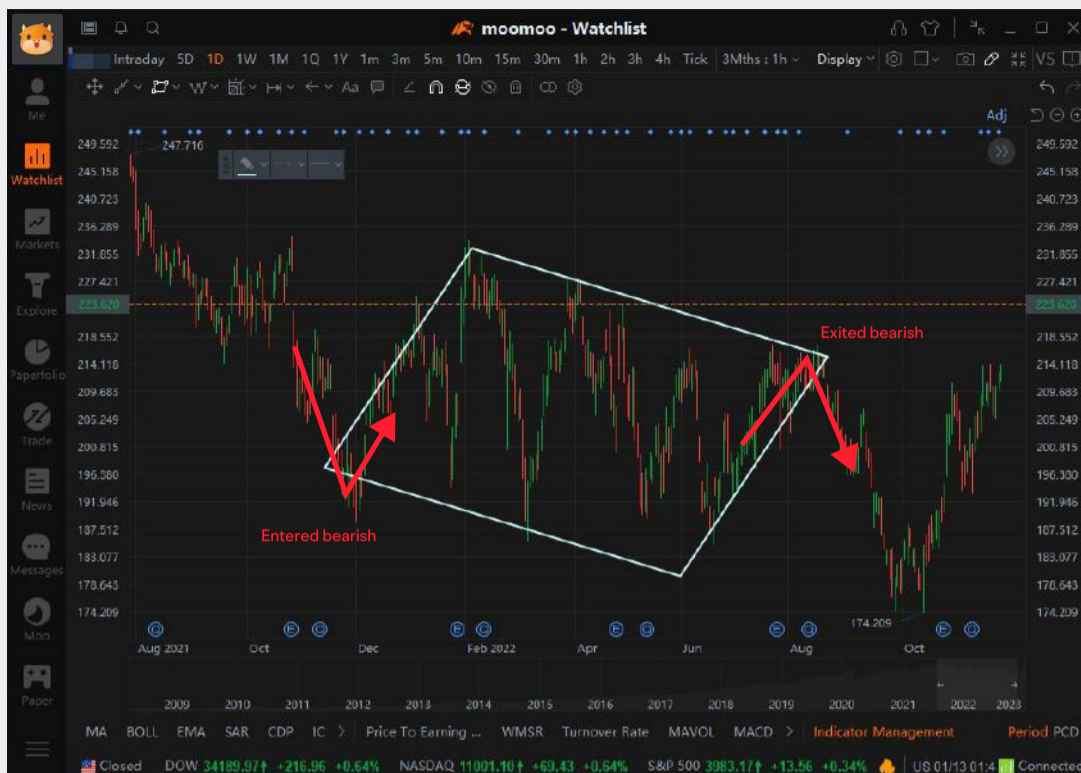


Figure 5 - 3 : Company B

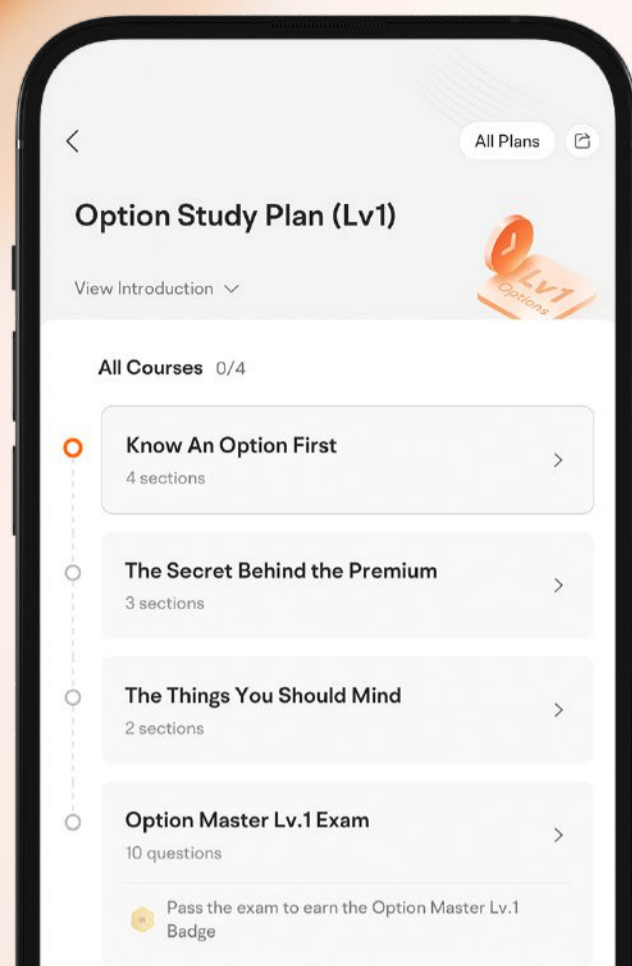


"Candlestick chart patterns can be very reliable at times if you know how to use them correctly," SpyderCall said. "Looking at these two charts, both companies entered and exited the diamond bearish pattern, which is how bearish continuous diamond pattern theoretically works. The diamond might look a bit ugly or lopsided, but the same rules apply."

"Remember the market will do whatever it wants, and sometimes it will do the exact opposite move that everyone in the market is thinking. Don't anticipate the market, participate in the market," SpyderCall added. "I mostly trade solely based on technical analysis, but I naturally combine fundamental and macroeconomic knowledge in every investment. Before making any investment, I would research what the overall markets are doing - either in the US or globally. It helps me to decide on an investment and detect an overall trend in the equity market."

6. Study Plan

Study plan integrates the existing investment education content into a clear and complete learning program that provides systematic study courses with different difficulties to users at different levels.



Case Study 1 - Efren Aceves, a US moomoo user



Efren is a fourth-generation Mexican-American living in San Diego and the first in his family with a college degree.

Key Words: *all types of investors*

On the day when Efren discovered moomoo's study plan feature, he was so excited that he read it through and took most of the quizzes. Since then, he spends a few minutes every day on this feature and visiting it in his spare time.

"With the study plan, I can review the stuff I have learned before, as well as fill in the blanks I have not learned yet. The test part is a great addition to the plan," he said.

When Efren started investing four years ago, he had no access to formal training, mentors, or like-minded friends. Everything was so new and overwhelming to this beginner who was learning from stock forums, YouTube, and information provided on the interface of trading apps.

"I wish I had access to the moomoo's study plan feature back then. It separates different aspects of investing in an easy and cohesive way that makes investing knowledge more manageable and less overwhelming."

Efren considers himself a beginner investor as he is still testing the waters to see what type of strategy best matches him. He is more of a long-term investor at this stage.

He wants to encourage people who are still not confident in their financial knowledge to learn and invest.

"Some people feel that they are not smart enough to participate in the market, since we are taught to be intimidated by the market. Many of them never invest, or simply rely on others to invest for them. However, my opinion is that investing is fundamentally risky, and I know my money is more important to me than it is to someone else. I would rather lose my own money than have someone else lose it for me," he said.

"I am a firm believer that we should all have financial autonomy. Personally, I would take some time to learn and do it for myself, rather than trust a stranger with my belongings and life savings. "

Top 3 most used study plans

1	Stock Study Plan (Lv1)
2	Option Study Plan (Lv1)
3	Fund Study Plan (Lv1)

Top 3 study plans with the most learners passing the exam

1	Stock Study Plan (Lv1)
2	Option Study Plan (Lv1)
3	Option Study Plan (Lv2)

Top 5 most sought-after courses

1

Handy Tools to Invest Better

2

Trading Made Easy on Moomoo (Step by Step)

3

Trade Options: Quickstart Guide

4

How to Pick Stocks Like Masters

5

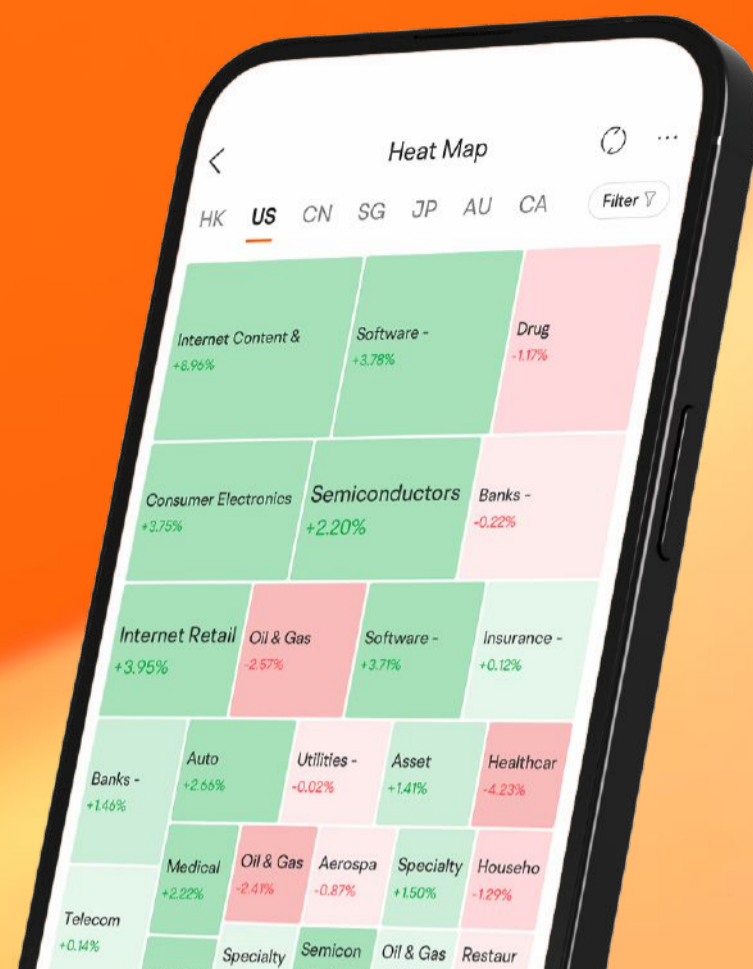
ETFs: Easy Ways to Boost Your Portfolio

* According to moomoo data from May to October in 2022.

* Please note, completing any courses, exams, or study plans does not qualify someone for an options trading account. Eligibility requirements still apply. Options involve significant risks and are not suitable for all investors.

7. Heat Map

The heat map can be drawn by Market Cap, Volume and Turnover. For example, the larger the total market value of the corresponding stock is, the larger the sector area will be. Meanwhile, the color of a sector and the shade of the color are determined by the fluctuation range. The greater the fluctuation is, the darker the color will be.



Case Study 1 - ZnWC, a Singapore moomoo user



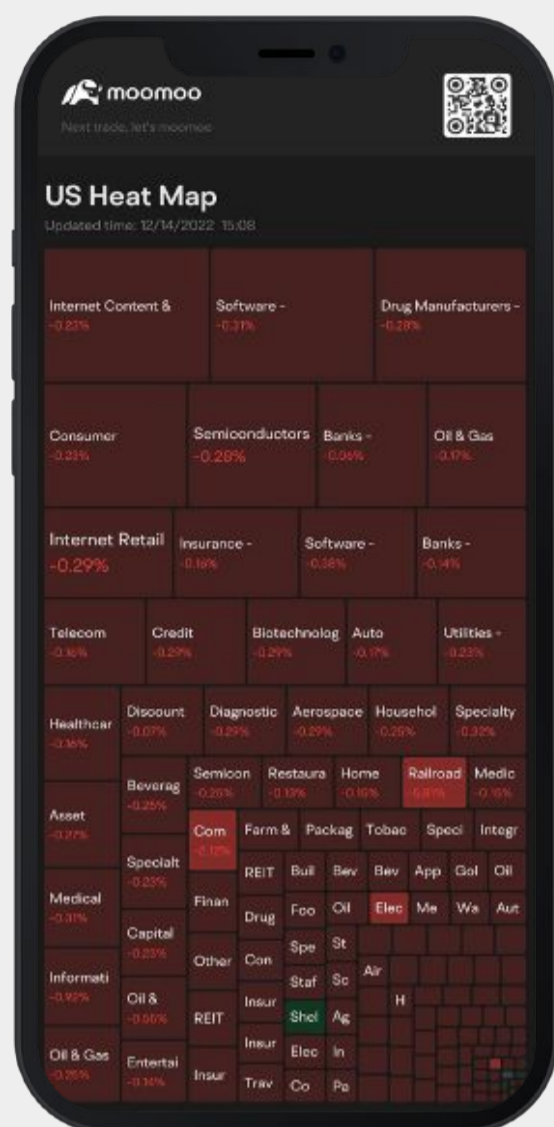
ZnWC is 55-year old and retired. He joined moomoo 2 years ago.

Key Words: *value investor, long-term investor*

ZnWC, a Singapore user who is learning to build wealth through investment and writing about his investing stories, said moomoo's heat map feature helps him in two ways. First is finding out the best performance sectors or stocks over a period of time, and second is analyzing the stock market situation.

He showed us a screenshot of heat map illustrating the reaction of US stock market after the release of 2022 November US consumer price index.

Figure 7 - 1: Heat map screenshot after the release of 2022 Nov US CPI



Reading Notes -
Learn more about
ZnWC's story with
the heat map feature
-

[https://
www.moomoo.com/
community/
feed/1095108369449
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data_ticket=212ca24
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k-new](https://www.moomoo.com/community/feed/109510836944902?data_ticket=212ca245a589f1e400fb2e247953bc77&futusource=nnq_comment_stock-new)

When almost all the sectors are in red on the screen, the user can easily understand that the market was trembling at that moment, and stock prices have generally plunged.

Although the heat map is a good tool to gather market information, ZnWC reminds investors the importance of making independent investing decisions.

"You sell based on your exit plan, not your fear. You buy based on your risk appetite, not FOMO or fear of missing out," ZnWC said. "We should do our own due diligence and take responsibility for our investments."

ZnWC chose Barista FIRE because he no longer has any liability. He owns property and lives a simple life enjoying cooking, healthy foods, exercise and meditation.

Meanwhile, he decided to use around 10% of his funds to explore high-risk investments and diversify his portfolio with the investment goal of building wealth and helping others. He believes high-risk investments can be managed through learning and research.

Case Study 2 - Shine, moomoo's product manager



Shine's investing strategy is more like value investing. He will do fine-grained research before making investing decisions.

Key Words: *value investor, long-term investor*

Moomoo's product manager Shine believes heat map can be useful for investors exploring new sectors and stocks.

Investors can quickly identify potential investing opportunities with this feature, especially in an overall sluggish market. Sectors or companies that manage to maintain their growth in a bear market will significantly stand out on the screen. For example, the oil and gas sector made it eye-catching on the heat map during 2022.

Shine shares a way to spot unknown companies that might worth looking into with this heat map feature. He references the **market capitalization** as a useful indicator in his case. By selecting the date range to year-to-date in the heat map feature, he is able to identify the front runner sectors in 2022.

Next, he chooses the most interesting sector and click to get the company ranking by their market capitalization increment. The biggest mover would be something to consider studying.

"My investing strategy is more like value investing, so I carefully examine the company's share price chart and make sure the price movement is reasonable. I do not want to spend my money and time to invest in something that I cannot even explain, because these stocks might be manipulated or camouflaged. And that, I check the company's profile and financials and study its competitors. Only after fine-grained research and analysis can I make my independent judgement to invest in a new company," he said.



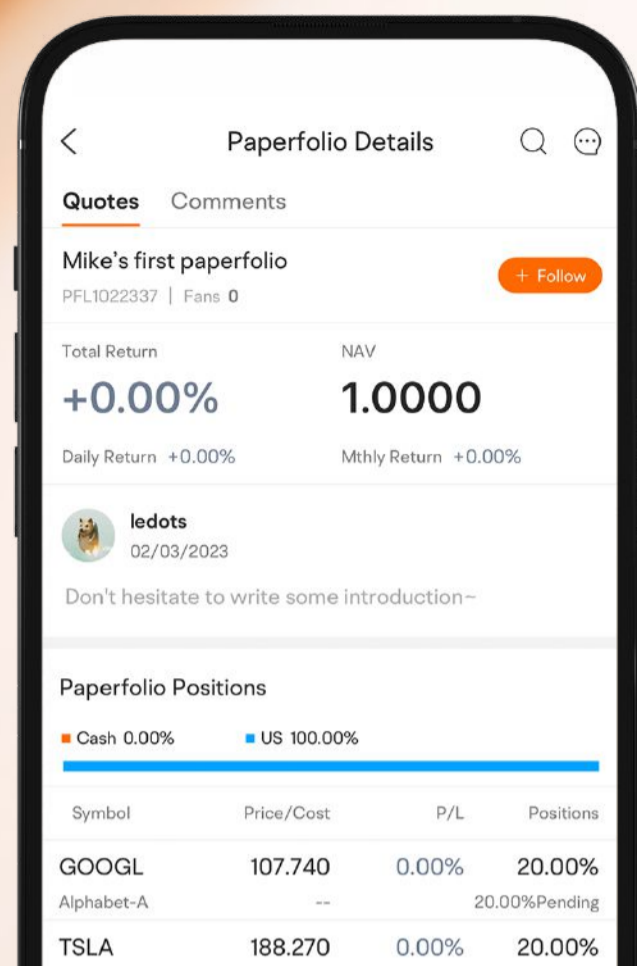
Reading Notes -
Market

capitalization refers to the total value of a public traded company's outstanding shares of stock. It is commonly referred to as "market cap".
Market Cap = Current Share Price * Total Number of Shares Outstanding

8. Paper Trading

Paper trading allows investors to experiment with market trading, which can build traders' trading skills in real markets without risk. The feature is completely free to moomoo users, and does not involve real expenditures.

*Images provided are not current and any securities are shown for illustrative purposes only.



Case Study 1 - Sera, a moomoo user in Australia



Sera is a full-time mom with four kids.

Key Words: *value investor, long-term investor, intraday trader*

Sera likes moomoo's paper trading feature because it has great tools, coupled with detailed company information and up-to-date news and analysis. She believes this feature will be a good starting point for those who are new to moomoo or learning to trade from scratch.

"The amount of information on your virtual portfolio can be bit overwhelming at first. My advice to junior investors would be to take it slow," she said. Sera takes several steps to study a company with the paper trading feature before she considers investing with her real account.

First, she conducts research, reading their latest news and factual articles to get a sense of the target company's actual value. The track charts and trends also provide helpful information. The one-month, four-hour, one-day and one-week charts are Sera's most used charts.

In addition to MACD, **OBV**, RSI and other basics, she also closely monitors the



Reading Notes - **On-balance volume (OBV)** is a technical trading momentum indicator that uses volume flow to predict changes in stock price. OBV shows crowd sentiment that can predict a bullish or bearish outcome.

stock's volume and turnover against the price changes, which shows how much pressure there is on either the buy or sell side.

The information she obtains from the virtual portfolio gives her a better idea of market sentiment.

Moreover, Sera has three key stocks in her portfolio, both real and virtual. These three companies are well researched, and she believes these three will likely perform well. She practices different strategies with the paper trading feature, combining other stocks with the three key stocks.

"By watching market sentiment closely in my virtual portfolio, I managed to find some beautiful entry and exit points in reality," Sera said.

However, investing is not always smooth and successful. Sera recalled a time when she bought some shares in a company amid what she believed was a dip, but it was actually a downtrend with just some small jumps.

"I got a bit impatient at that time, and I sold them before they really peaked again," Sera said. "But monitoring my virtual portfolio definitely makes it easier for me to realize that the stock was trending down. This is the cost of learning. But how heavy the price depends on what you have learned."



Reading Notes -
Learn more about
Sera's paper trading
experience -
80

Case Study 2 - ZnWC, a Singapore moomoo user



ZnWC loves writing and cooking, and is still improving his investing skills.

Key Words: *value investor, long-term investor*

To ZnWC, the paper trading feature is a handy tool to test his trading strategies and ideas. He uses this feature on a daily basis, mainly to monitor his target stocks' **dollar cost averaging (DCA)** and seek for better investing opportunities. Recently, he is learning and practicing option trading with his virtual portfolio as well.

ZnWC keeps good self-study habits such as writing journals and trading notes to learn from previous mistakes and prevent repeating them. He reviews his virtual portfolio from time to time and summarizes lessons learned from it to polish his investing skills.



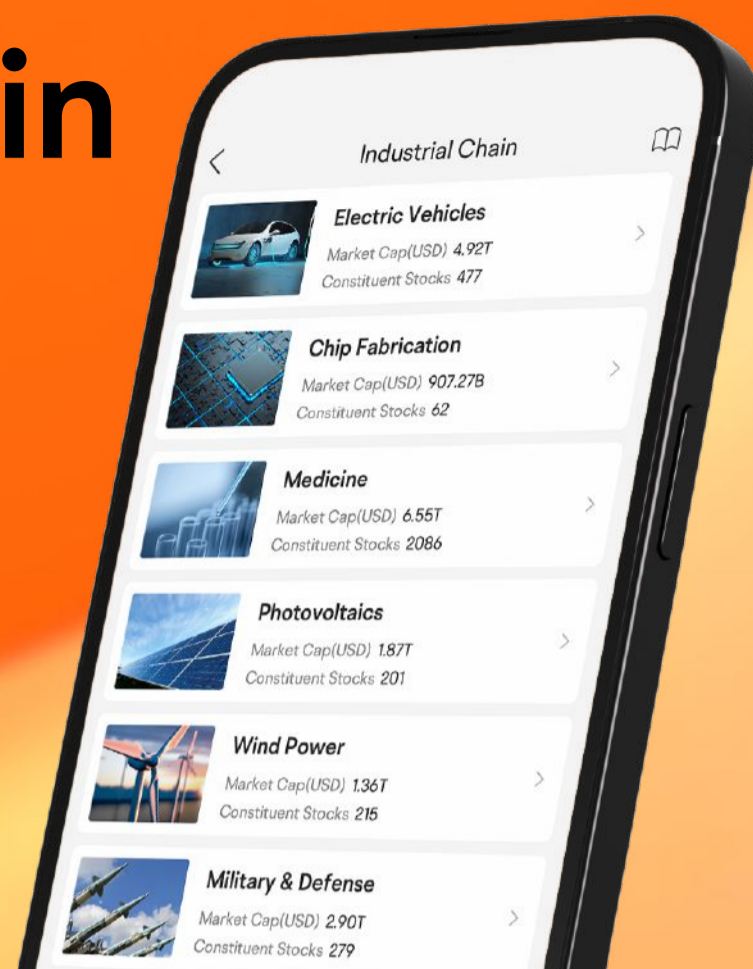
Reading Notes –
Dollar Cost Averaging is the practice of investing the fixed amount of money in a target security at regular intervals over a certain period of time.

“I consider myself as a long-term investor, and normally I will not sell the stocks unless the company's fundamental aspect has changed. However, I also trade for profit if I find the conditions right,” ZnWC told moomoo.

“It is about choosing the lifestyle you want to live. I wanted to prepare for my retirement when I started investing. But after in-depth study and practice, I decided I also want to build wealth to beat inflation by investing and support other investors by writing and sharing my learnings.”

9. Industrial Chain

Industrial Chain is a feature supporting the categorization of companies in the upstream, midstream and downstream business inside an industry. Users can check the segments involved in the industry and the companies included in each segment.



Case Study 1 - Sera, a moomoo user in Australia



Sera is a full-time mom with four kids.

Key Words: *value investor, long-term investor*

Sera's main investing strategy is thinking long term, while trading both long and short. She is most interested in shipping and energy industries, but also proactively conducts research to the emerging electric vehicles (EV) industry.

She plans to study EV industry in more forward looking way. Instead of being a fan of any EV star companies, she is thinking about the connection between the EV industry and Australian mining industry. Mining is a pillar industry of Australia and mining companies are heavily involved in the EV manufacturing from the ground up.

However, the EV industry evolves so fast and the materials for investors to read can be overwhelming. With moomoo's industrial chain feature, investors can quickly identify companies that align with their interests. For example, users are able to see the companies that sit between upstream and midstream in the EV industry and are nowhere near the finished product such as Lithium and Cobalt miners.



Reading Notes -
Learn more about
Sera's industrial chain
using experience -
[https://
www.moomoo.com/
community/
feed/1095384367104
06?
src=13&client=mobil
e&futsource=nnq_o
thers&target_lang=2](https://www.moomoo.com/community/feed/109538436710406?src=13&client=mobil&futsource=nnq_others&target_lang=2)

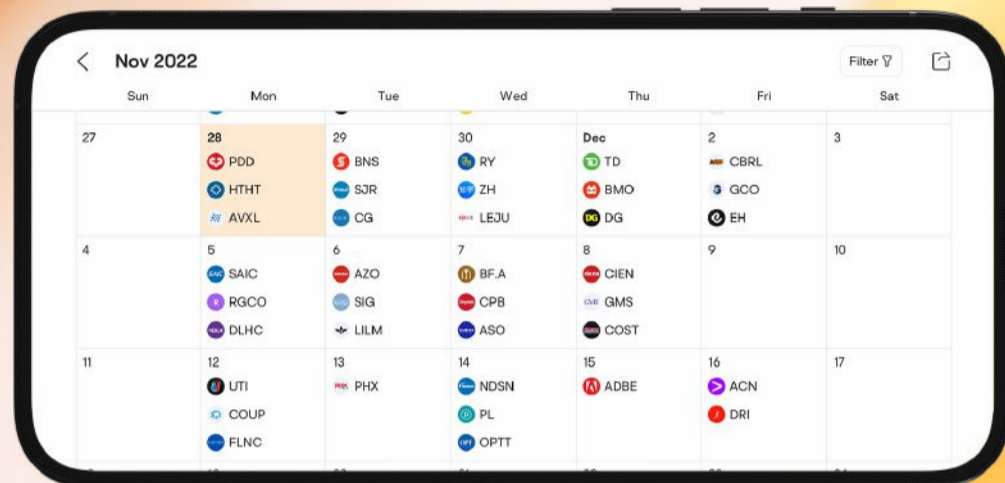
"When we get excited about growing and evolving markets, it's easy to forget the big guys behind the finished products," she said.

Sera saw that the Australian government has tried to implement schemes and set dates to phase out petrol vehicles. For Sera, clean energy and fewer emissions seem to be a good direction to go in the future.

"When my children come of age and everyone is driving electric vehicles, hopefully I have learned and invested enough in the right companies at the right times. I want to build something up for my children," Sera said.

10. Earnings Calendar

Earnings calendar is one function of earnings reports. It provides upcoming quarterly reports on a daily, weekly, or monthly basis. Users can save interested schedule to their phones' calendar and get access to earnings conference call.



*Images provided are not current and any securities are shown for illustrative purposes only.

Case Study 1 - Trade The Trader, a stock market trading educator



Trade The Trader is a momentum trader in Canada who relies heavily on technical indicators. He has over six years of investing experience.

Key Words: momentum investor, option investor, short-term investor

Trade The Trader thinks moomoo's earnings calendar feature is a useful tool to potentially take advantage of the market volatility during **earnings season**.

"Moomoo's earning calendar shows what companies' earnings calls are upcoming in the next few weeks. This gives you the opportunity to prepare for the volatility and allows you to do further research into the company."

Trade The Trader shares an experience of how to potentially take advantage of the market volatility during earnings season with moomoo.



Reading Notes - During the **earnings season**, a listed company will hold earnings call to discuss the company's financial results during a given reporting period, such as a quarter, a fiscal year and a semi-annual period. The company's management team will speak to investors, analysts and the media directly on the call.

Last year, one of the leading companies (company A) in the social media industry released an unexpectedly dismal quarterly report, worrying the investors and others in the market. When a company posts such earnings result, it could also send a very negative signal to the market that the whole industry has suffered in the previous quarter and the whole sector could slump. Panic selling may be possibly triggered, and this is where opportunities would likely exist.

"With the earnings calendar feature, moomoo quickly navigates me to company B, another social media company that is about to release its earnings. This allows me to prepare myself for potential share price bounce of company B," Trade The Trader said.

However, before company B officially releases the earnings, retail investors usually do not receive any hints about its real performance. Trade The Trader made such judgement based on his deep understanding of the market momentum. It is essential that investors do enough research before they make investing decisions.

Appendix

- Value Investors - Value investing is an investment strategy that involves picking stocks that appear to be trading for less than their intrinsic or book value. Value investors actively ferret out stocks they think the market is underestimating.
- Technical Investors - Technical analysis is a trading discipline employed to evaluate investments and identify trading opportunities in price trends and patterns seen on charts. Technical investors believe past trading activity and price changes of a security can be valuable indicators of the security's future price movements.
- Momentum Investors - Momentum investing is a trading strategy in which investors buy securities that are already rising and look to sell them when they look to have peaked. Momentum investors usually use a strict set of rules based on technical indicators that dictate market entry and exit points for particular securities.
- Long-term Investors - An investor who intends to hold a security, portfolio, or investment strategy for a term of longer than one year.
- Short-term Investors - Short-term investors are on the opposite of long-term, this group usually related to technical trading strategy, they sell stocks only depending on stock price trend.
- Intraday Traders - Intraday traders are investors who buy and sell stocks within one day and execute strategies attempting to profit off of price changes for a given asset using a wide variety of techniques.

- Operating Margin – Operating margin measures how much profit a company makes on a dollar of sales after paying for variable costs of production, but before paying interest or tax. Higher ratios are generally better. It is calculated by dividing a company's operating income by its net sales.
- Dividend Yield – Dividend yield shows how much a company pays out in dividends each year relative to its stock price. It is calculated by dividing the total dividends paid by new income.
- Debt to Equity Ratio – Debt to equity ratio measures the extent to which a company can cover its debt. It is calculated by dividing a company's total debt by its total shareholders' equity.
- MACD - Moving average convergence/divergence (MACD) is a trend-following momentum indicator that shows the relationship between two exponential moving averages of a security's price.
- BOLL – Boll indicator finds the position of a security within Bollinger Band.
- RSI – The relative strength index (RSI) is a momentum indicator used in technical analysis, which measures the recent price changes as it moves between 0 and 100.

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