InvestOps Postmortem Review

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| **Title & Date** | *A brief description of the view.*  **XYZ trading up** | | | *Creation date.*  7/11/2020 |
| **Strategy** | *A brief description of the trade strategy.*  Bull call spread | | | |
| **Return Analysis** | *Capital at risk.*  280 | | *Net gain or loss.*  220 | *Return on investment.*  +79% |
|  | *Investment history.* | | | |
| **History** | **Date** | **Event** | | |
| 7/1/2020 | Opened trade | | |
| 7/10/2020 | Exited when positions cancelled out from expiration assignment | | |
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| **View Analysis** | *Review of view.*   * Directional view was accurate * Magnitude of move turned out to be larger than expected | | | |
| **Trade Plan Analysis** | *Review of trade plan.*  Should have included more price and timeframe detail for rolling up trade | | | |
| **Monitoring Analysis** | *Review of monitoring.*  No problems, just needed to occasionally check in on underlying price | | | |
| **Adjustment Analysis** | *Review of adjustments.*  Did not adjust, although probably could have been more aggressive | | | |
| **Process Analysis** | *Review of process.*  Need to include more precision in view to inform a more optimal trade plan | | | |
| **Notes** | *Additional notes or lessons.*   * Directional trading with options was a good call for risk and allocation * Was nervous about the run up prior to earnings, so it was good to get out before * Poor option liquidity was a bigger factor on trade entry than expected | | | |