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
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| **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
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