InvestOps View Development Worksheet

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| **Title & Date** | *A brief description of the view.*  **XYZ trading up** | | *Creation date.*  6/30/2020 |
| **Subject** | *The security, sector, or other subject this view focuses on.*  XYZ | | |
| **Properties** | *The properties of the subjects that are of most interest, such as price, volatility, interest rates, etc.*  Price, volatility | | |
| **Expectations** | *The expected behavior of the subject’s properties.*   * XYZ should continue to move up into next earnings * Near-term move up should be sharp | | |
| **Research** | *Research supporting the view.*   * Golden cross on 6/15/20      * Historically moves up in the month before earnings * IV is about where it should be at this point | | |
| **Risks** | *Research or other risks that counter the view.*   * Earnings upcoming, so bad news may run against bullish expectations | | |
|  | *Relevant upcoming events, such as earnings calls, dividends, central bank announcements, etc.* | | |
|  | **Date** 7/22/2020 | **Name** Earnings | |
| **Events** | **Date** | **Name** | |
|  | **Date** | **Name** | |