

Register Today!  
See Form Inside for Details

# Technical Analysis

Presented by Energy Management Institute  
September 10-11, 2014 | Norris Conference Center | Houston, TX



*Gain a comprehensive understanding of advanced technical tools and trading strategies, and how and when they should be used.*



# Technical Analysis

September 10-11, 2014 – Norris Conference Center – Houston, TX

*While using technical analysis can add enormous value to a firm, a lack of understanding can easily lead to disastrous results. This course explains the derivations, applications, strengths, weaknesses and variations of the major technical indicators and techniques.*

## What You Will Learn

The course is designed to help traders and risk managers in the energy industry gain a thorough understanding of the most popular and successful techniques and how they can be applied to their specific business. You'll leave the course with an integrated framework for incorporating technical analysis into energy trading and risk management. **Topics covered include:**

- The technical tools and techniques at your disposal to trade and manage the ongoing volatility and the price impact of the various energy markets.
- A view of the main elements of technical analysis used for trading discipline, quantifying and managing risk, and coordinating with fundamental analysis.
- Using trend lines, Japanese Candlesticks, support and resistance and retracement levels.
- How to analyze and use volume and open interest.
- The characteristics of the Elliot Wave Theory.
- Calculating and using moving averages and MACD.
- Using DMI, Parabolics, Stochastics, RSI, %R, Momentum, MarketProfile and Bollinger Bands.
- How to combine indicators and approaches.
- Hedging and speculating with technical analysis.
- Mechanical trading system development: trend-following, counter-trend and combining non-correlated trading systems.
- Candlestick reversal patterns
- How to limit downside risk without eliminating upside potential.
- Knowledge through real-world trading and hedging examples using real-time data with a marked-to-market evaluation.

## Who Should Attend

This course is applicable to all levels of the energy industry. Individuals whose decisions have significant financial impact will benefit from this program. Managers from areas such as marketing, sales, manufacturing, engineering, supply and distribution, trading risk management, purchasing and financial and accounting will find the course highly beneficial.

## CPE Credits



This course earns 14 CPE credits. EMI awards credit hours towards CPE and Certified Purchasing Manager status (CPM).

## Course Times

8am - 4pm, September 10  
8am - 4pm, September 11

## Venue Location

**Norris Conference Center**  
Houston/City Centre I/  
10 Katy Freeway Area  
803 Town and Country Lane  
Houston, Texas 77024  
713.590.0950

## Registration Fees

1st delegate: \$1,995  
2nd delegate: \$1,795  
3rd delegate: \$1,600

Fee includes full course, expert instruction, course materials, continental breakfast and lunch.

# 3 Easy Ways to Register

**1** Call PMA Conference Management at 201.871.0474 or send email to: register@pmaconference.com.

**2** Complete & fax this form to 253.663.7224.

**3** Complete & mail the form to: PMA Conference Management, POB 2303, Falls Church, VA 22042.

[Click Here to Register Online](#)



---

# Technical Analysis

September 10-11, 2014 – Norris Conference Center – Houston, TX

---

## Course Syllabus DAY ONE: Overview and Charting

---

### Session 1: Overview of Technical Analysis

---

Technical Analysis covers a broad array of topics, tools, techniques and systems for trading and hedging. This session will provide you with an overview of the entire topic. This session sets the stage and presents a historical perspective of this relatively young profession, focusing on the history of charting, evolution of technical analysis, overview of all of the major tools and techniques, and an understanding of the basic patterns.

---

### Session 2: Technical Analysis Versus Fundamental Analysis

---

- Historical overview of choosing fundamental or technical analysis.
- Concept of a Techno- fundamentalist.
- What each encompasses, when to use each, how to use each and when to combine both approaches.

---

### Session 3: Lets Begin to look at the Main Techniques of Technical Analysis

---

- Price charting and charting techniques.
- Mechanical indicators.
- Advanced techniques.
- Combining various indicators.

---

### Session 4: Price Charting and Charting Techniques

---

- The price chart: the cornerstone of charting.
- Construction, analysis and interpretation of the price chart.
- Exploration of what the energy market is telling us about the market direction. Charting analysis and techniques and the analysis of price and volume.
- Detailed explanation of the fields that define a commodity's price and volume.

---

### Session 5: Charting Systems

---

- Overview of Dow Theory applied to commodities.
- Tried and true classical charting patterns: head and shoulders, multiple heads and shoulders, rounded tops and bottoms, triangles, broadening tops, rectangles, double and triple tops and bottoms, wedges, flags and pennants, reversals, gaps, and, most importantly support, resistance and trend lines.
- When to buy, hold, and/or sell using current and past energy examples.

---

### Session 6: A Few More Charting Techniques and Psychology

---

- What is your time horizon and your charting preference?
- For the day trader, tick charts, 5-minute, 60-minute charts, etc.
- Point and figure charts and a touch of Candlestick charting.
- Candlestick reversal patterns.
- Combining very short-term chart signals with the longer-term trend in the market.
- Combining techniques based on trading and hedging objectives over various timeframes.

---

### Session 7: Behavior of the Market and Participants

---

- What makes traders react?
- Philosophy and psychology of the trader.
- Following the trend.
- Contrarian theory.
- Interpreting the news.
- Fear and greed.
- No-nonsense rules that should be a part of everyone's trading repertoire to successfully compete in the highly volatile energy market.



---

# Technical Analysis

September 10-11, 2014 - Norris Conference Center - Houston, TX

---

## Course Syllabus

### DAY TWO: Mechanical Indicators and Advanced Topics

---

#### Session 1: Mechanical Indicators

---

- The PC and the technical trader.
- The ability to develop, test and use mechanical indicators in conjunction with charting techniques as well as a stand alone basis.
- The evolution of indicators, the various classes of indicators, oscillators, etc.
- Review of major indicators used throughout the trading industry, i.e. moving averages, oscillators, momentum, stochastics, volatility, regression models, directional indices and Fibonacci numbers.

---

#### Session 2: Putting The Indices To Work

---

- Application of each of the indicators previously discussed to real situations in various energy markets.
- How successful are the buy signals, sell signals, no trade decisions?
- Which indicators work better in trending markets and which work better in sideways markets?

---

#### Session 3: Time To Create Some Trading Systems

---

- Improving results by combining indicators/techniques using a carefully designed and tested system.
- Software programs currently on the market and their purpose.
- Examination of basic systems and how they perform in energy markets.
- Opening range breakout systems and pivots.

---

#### Session 4: Advanced Topics In Technical Analysis

---

As computers become more powerful and cost effective along, very talented traders and analysts are pushing tools and techniques into more complex territory. Concepts discussed include:

- Wave theory.
- Optimization techniques.
- Portfolio trading.
- Pattern recognition.

---

#### Session 5: TechnoFundamentalist

---

- The concept of combining the why and when of the market.
- Do the Fundamentalist and Technical approaches contradict each other or can they be used synergistically?
- This session will use them synergistically in analyzing the main energy markets. Past and current data will be used to demonstrate the approach.



# Technical Analysis

September 10-11, 2014 – Norris Conference Center – Houston, TX



## *Learn From the Experts that Experts Trust*

EMI experts are frequent editorial contributors to petroleum magazines and are trusted by today's leading news sources.

Our experts have been featured in:

Futures Magazine • The Wall Street Journal • USA Today • The New York Times • The Washington Post • Journal of Commerce • CNN • NBC • CBS • ABC • Bloomberg • Reuters

**EMI's leading industry experts** have an average of over 30 years of knowledge and experience in:

**Energy • Commodity trading • Risk management  
• Education • Consulting • Financial services**

Plus many years of managing marketing, international trading, manufacturing, consulting, start-up operations and project finance operations of well-known companies; integrated major oil companies as well as international trading companies.

EMI's industry experts have also provided risk and value management analysis, advice, information, and services to a variety of companies in the electric power industry. Clients have included power marketers, integrated utilities, retail power providers, hedge funds, and power plants.

**Highlights of our instructors' experience** include: • Developing a suite of models for a variety of power markets that quantify value and risk • Managing spark spread portfolios for hedge funds in the power markets • Operating in futures trading pits as a market observer in the power markets • Developing working papers for investigations and performing compliance audits in the power industry • Helping Texaco initiate its first use of futures exchanges as an integral part of hedging/trading strategy • Chief Operating Officer of Triwell Marketing and refining • Director of OPIS, Oil Price Information Service, a management-consulting and educational services group that solely focused on the downstream energy industry • Member of Board of Directors of Longview Refinery • Member of the New York Mercantile Exchange Petroleum Advisory Board • Expert witness for a hearing before the subcommittee on surface transportation for the Commerce, Science, and Transportation Committee of the US Senate • Supplied expert testimony to a US Senate sub-committee hearing on diesel petroleum product pricing • Supplied testimony to the Federal Highway Administration regarding fuel tax evasion • Expert witness in a MTBE litigation against the major oil companies • Publishers of The Daily Hedger, BTU's Daily Gas Wire and BTU's Daily Power Report, which advise thousands of petroleum professionals daily.

Our instructors are frequent expert speakers for numerous petroleum industry events and trade associations including: • DOE DESC World Energy Conference • OPIS Fleet Fueling • NYMEX • Fuel Management University • NATSO • ATA • AAA • Dairy Distribution • eyeforEnergy eCommerce • OPIS Supply Summit • CIOMA • American Society of Mechanical Engineers • American Society of Lubricating Engineers • Ambrust Aviation • NACHA.

Over the years EMI has developed a series of intensive courses covering all aspects of Energy from production all the way to managing the impact price and volatility on the margin of end-users, resellers, traders, marketers, shippers, retailers and refiners. Our instructors have had the privilege to instruct thousands of professionals representing all aspects of the energy industry, including every major oil company (i.e. Exxon Mobil, BP, Shell, Equilon, Motiva) major power utilities (i.e. Sempra, Edison Mission, Berkley, Toronto Hydro, Dominion, Conectiv) small marketers (i.e. Sprague, Getty, Southern Counties, Western Petroleum) trucking fleets from 50 to 10,000 (i.e. UPS, U.S. Postal Service, Yellow, Pepsi, Werner), gasoline-powered fleets hyper-markets (i.e. The Pantry, Wawa, BJs Wholesale) and many fortune 500 energy consumers.



# Technical Analysis

September 10-11, 2014 - Norris Conference Center - Houston, TX

## REGISTRATION FORM

### Registration Fees

\$1,995 for full program

This fee includes expert instruction, course materials and lunch.

### Discount for Additional Attendees

2nd delegate: \$1,795

3rd delegate: \$1,600

### Enrollment Information (Please Print Clearly)

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

### Payment Method

Please invoice my company (payment must be received prior to course date)

Mastercard     Visa     American Express

Card Number: \_\_\_\_\_ Expiration Date:    /    /

Card Holder Name: \_\_\_\_\_

Card Holder Signature: \_\_\_\_\_

### Refund/Cancellation Policy

Attendees may reschedule for a different date or course with no penalty. Attendees may substitute a colleague in place of themselves as long as prior notice is given to EMI. Course fees are 100% refundable up to 14 days prior to course date, 80% refundable up to 5 days prior to course date and 50% refundable up to 2 days prior to course date. Cancellations are non-refundable thereafter.

## 3 Easy Ways to Register

- 1 Call PMA Conference Management at 201.871.0474 or send email to: register@pmaconference.com.
- 2 Complete & fax this form to 253.663.7224.
- 3 Complete & mail the form to: PMA Conference Management, POB 2303, Falls Church, VA 22042.

[Click Here to Register Online](#)

### Venue Location

**Norris Conference Center**  
Houston/City Centre I/  
10 Katy Freeway Area  
803 Town and Country Lane  
Houston, Texas 77024

### Recommended Hotels

- Hotels within walking distance:**
- Hotel Sorella (Attached by skybridge)**  
800 West Sam Houston Parkway  
Houston, TX 77024  
PH 713.973.1600  
www.hotelsorella-citycentre.com
- 4 Points Sheraton (0.7 miles)**  
10655 Katy Freeway  
Houston, TX 77024  
PH 866.716.8133  
www.FourPoints.com/MemorialCity