

# Kirk Lindstrom's April 2008 Investment Newsletter

**SPY S&P500 SPDR:** This "trust" is comprised of the 500 stocks in the S&P 500 Index, which is designed to capture the price performance of a large cross-section of the U.S publicly traded stock market. The main objective of the fund is to replicate the total return of the S&P 500 Index. The "SPDR Trust, Series 1" seeks to match the total return of the S&P 500 Index. To accomplish this, the trust utilized a full replication approach. With this strategy, all 500 securities of the S&P 500 Index are owned by the Trust in their approximate market capitalization weight.

**03/19/08 Update:** I added my first 77 shares of SPY to my explore portfolio on 3/7/08 at \$130.61 at a total cost with commission of \$10,168.97. My plan is to use this as a "trading position" where I add to it when the market is down and take profits or sell it when my sentiment indicators are saying, "take profits." The dividend rate at \$131 is 2.4% that I will reinvest in more shares.

**Last buy:** 77 shares at \$130.61 with a 1.5% stop loss at \$127.99. Stop loss removed a day later as I like this for the long term.

### SPY Buy/Sell History

Date	Action	Shares	Price \$	Amount \$	Running \$ Total	Shares Held	Breakeven \$ per Share
03/07/08	BUY	77	130.61	-10,069	-10,069	77	130.77
	Reinvest Dividends						

From ETF Connect [http://www.etfconnect.com/select/fundpages/etf\\_funds.asp?MFID=64563](http://www.etfconnect.com/select/fundpages/etf_funds.asp?MFID=64563) at \$130.79, the dividend rate is 2.37%



More Charts <http://home.netcom.com/~kirkindstrom/Charts/SnP500.html>

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**Disclaimers:** This newsletter covers stocks, bonds and mutual funds. I maintain a "paper portfolio" to see how my ideas do over time and I make the best attempt to track my performance as accurately as possible as if I were trading an actual portfolio. I may own all or some of these securities discussed in this newsletter and may buy or sell them at any time for "financial planning" or other reasons not discussed in this newsletter. I have made a best effort to obtain accurate information, but I make no warranties that that the information is accurate.

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