



Freddie: The Systematic Farmer

Key Quote

"I like the composite metrics like Quality Rank as they are useful shortcuts to getting a shortlist of candidates. I don't have to export as much data into my models anymore."

Background

Age: 40

Income: Software engineer - £95,000 salary

Investable Wealth: £100,000

Market: Mostly UK (home) + few US stocks

Security Types: Mostly stocks (25) + few funds

Investment Hero: James O'Shaughnessy

Broker: Interactive Investor

Tech Literacy: High

Financial Experience: High

About

Freddie began investing 7 years ago, but his style has changed over time. He is a 'numbers guy' and has always been interested in data science and quantitative analysis. He started investing because he was curious about how data could be used to identify opportunities in the stock market. He has built capital through diligent saving and is sensible with money.

He uses the platform in his own time, not at work. He checks Stockopedia couple of evenings per week to review his screens and check any news on his stocks. He also spends an hour or so at the weekend tweaking his screens,

updating spreadsheet and his Folio. He occasionally reads macro news on the state of the market. He has to fit investing around family commitments.

Investment Strategy

- Favours medium to long-term investments.
- Cautious and vigilant by nature.
- Invests based on theory, data-driven research, and evidence.
- Gets his ideas from screens, backtesting, and analysis.
- Prefers High Quality and Momentum stocks.
- Trades infrequently (quarterly).

Information Sources

- **Publications:** FT, IC, MoneyWeek.
- **Tools:** Market Screener (free account), other backtesting tools
- **Influencers:** James O'Shaughnessy, Cliff Asness, Fama and French.

Devices and Accessibility

- **Primary Device:** Laptop with external monitor (Stockopedia on one screen, his spreadsheet on the other).
- **Secondary Device:** Phone (for occasionally checking news on his stocks).
- **Challenges:**
 - Requires efficient tools for backtesting and strategy analysis.
 - Needs seamless integration between Stockopedia and his spreadsheet.

Prioritised Frustrations

1. **Strategy Effectiveness:** "How can I make my strategy more effective?"
2. **Testing Changes:** "How can I test changes to my strategy?"
3. **Short-Term Opportunities:** "Am I missing out on opportunities by sticking with my strategy and not adapting to macro-news?"
4. **Market Movements:** "Should I try to time the market?"

5. **Time Management:** "Managing my investments is time consuming with a full-time job and family!"

Goals

- Grow capital to retire in his 60s.
- Save enough money to pay for his children's education.
- Achieve steady long-term, market-beating performance.
- Invest tax-efficiently.
- Personal development and mastery.

Site Usage

Frequency:

- Checks the site 3 times per week, primarily to review news for stocks he is interested in.
- Conducts more in-depth research for a couple of hours at the weekend. Focused on reviewing screens and honing his strategy.

Key Tasks:

- Managing his spreadsheet and keeping it up to date.
- Planning and researching strategies, keeping an eye on his screens.
- Rebalancing his portfolio quarterly.
- Calculating custom metrics that can't be found in Stockopedia.
- Consuming educational content on strategies.