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Some pointers for your 2022 trading review

A Thread

A year end review can be boiled down into three simple questions:

1. What worked well?
2. What didn't?
3. What's next?

To do a deeper dive, here are some key questions to ask yourself.

This is, by no means, an exhaustive list.

Remember: Curiosity is the basis for improvement

If you had clear goals for 2022, did you achieve them?

If so, how challenging were they?

If not, what stopped you achieving them?

If you didn't set goals, why not?

Have you made a net profit in 2022? (Net of any expenses)

If not, what do you believe stood in your way?

If so, is the amount you're making, increasing year on year?

Did you do your best in 2022?

If not, what circumstances prevented you from not giving your all?

What was your biggest/best trade of 2022?

What led to this being the biggest/best trade?

E.g. Was it the result of a once in a blue moon move?
Was it due to running a position? Was it due to adding to a position?

Could this successful outcome be replicated in future?

What was your worst trade of 2022?

What led to this being the worst trade?

E.g. Did you take too much risk? Did you run a loss further than you ordinarily would?

How could you avoid this failure in future?

What was your biggest win streak of 2022?

Review the trades with the aim of working out the factors that led to this success.

E.g. Did you hit a market condition particularly conducive for your strategy such as a clear trend?

Could this success be replicated in future?

What was your biggest drawdown of 2022?

Review the trades with the aim of working out the factors that led to failure.

E.g. Did you trade through a market condition such as a low volatility environment?

Could this level of drawdown be avoided in future?

When you review 2022, do you find there are consistently recurring issues you haven't yet addressed?

E.g. Types of trades that don't work? Risking too much or too little? Deviating from your plan with detrimental effects?

Come up with a solution for improvement in 2023.

Are there processes you feel would improve your performance, but you aren't actively executing?

E.g. Journaling? Regular performance reviews?

If not, why not?

What can you do to make sure you action these processes going forward?

What distractions caused you to miss the most opportunities for trading/learning in 2022?

Work? Family commitments? Other?

Is there a way to minimise this distraction in the year ahead?

E.g. Work/family commitments can often be mitigated by careful planning

If you could rewind 2022, what advice would you give yourself knowing what you know now?

E.g. Was there a particularly bad month you might want to stand aside from next year?

Take the advice you would give to your past self and include it in your 2023 plan.

What are your goals for 2023?

An effective end-of-year business review should include a plan of execution for the upcoming year.

What processes will be put in place to meet next year's goals?

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