

# **STOCK INVESTOR COURSE:**

## **Detailed Course Curriculum**

### **Part I**

#### **1. Overview of Stock Investing**

- Importance of stock investing
- Different routes of stock investing
- Advantages over mutual funds
- Key success factors
- Need for Fundamental analysis & Market timing

#### **2. Economic Analysis**

- Understand the Economic Cycle
- Understand factors affecting the economic cycle
- Analyze the factors affecting the economy
- Understand the impact of these factors on the stock market

#### **3. Sector Analysis**

- Understand the importance of industry analysis while selecting stocks
- Analyze generic and specific factors affecting the Industry
- Understand sector rotation
- Understand impact of industry level factors on stocks

#### **4. Company Analysis (Qualitative and financial factors)**

- Identifying companies with sound fundamentals
- Utilizing analytical tools and identifying undervalued stocks

- Understanding various analytical factors affecting a company
- Choosing best companies from a list of peers in the industry
- Getting hands-on experience of analyzing companies using various tools
- Understand income statement and its components
- Calculate EBITDA
- Understand balance sheet statement and its components
- Calculate Working Capital
- Understand cash flow statement and its components

## 5. Screener

- Scan Sharekhan Stock Ideas using Trade Tiger
- Do Your Own scanning using “[www.screener.in](http://www.screener.in)”

## 6. Sharekhan Research products

- Sharekhan Fundamental Research Products
- Sharekhan Fundamental Research Team & its USPs
- Sharekhan Fundamental Research:
  - Approach
  - Process
- Sharekhan Fundamental Research Products usage and benefits

## Part II

## 7. Introduction to Trade Tiger

- Log into Trade Tiger & adjust Trade Tiger Settings
- Use “MarketWatch”, open charts, change time frames and zoom charts

- Open multiple charts + add studies
- Create and save layouts
- Place orders in Trade Tiger

## **8. Introduction to Charts, Terminology and Candle sticks basics**

- Basic market terminology
- Charts -The window into the market
- Candlestick Basics

## **9. Core strategy formation**

- Basic market terminology
- Charts- The window into the market
- Candlesticks Basics

## **10. Zone analysis**

- Zone analysis
- Core Strategy-Boring /Exciting technique

## **11. Trend analysis, Multiple Timeframes and Entry Strategy**

- Core Strategy-Trend Analysis
- Multiple Time Frame Analysis
- Entry Strategy

## **12. Exit Strategy**

- ATR - Average True Range
- Exit Strategies
  - Initial Stop Loss,

- Exit on Fundamental Sell
- Bollinger Band method
- Re-Entry Strategy
  - After Initial Stop Loss
  - Adding on to position
  - Bollinger Band method
    - Price Correction
    - Time Correction

### 13. **Risk management**

- Sources and Types of Risk
- Techniques/Guidelines to manage risks
- Rules for risk management
- Dos and Don'ts of Risk management
- Using options to manage risk