

FUNDAMENTAL ANALYSIS PART 1

1. Introduction to Investing

- a. Stock Market 101
- b. What Drives Share Prices
- c. Why Quality Investing Works
- d. Getting Started with Quality Investing

2. Understanding the Business

- a. Types of Business Models
- b. What is an Economic Moat - Definition and Examples
- c. Using SWOT Analysis to evaluate a Company
- d. Understanding Your Circle of Competence

3. Evaluating the Management Team

- a. Importance of Management Team
- b. Evaluating Executive Experience and Compensation Structure
- c. Assessing Insider Activities and Ownership
- d. How to Gain an Insider's Edge

FUNDAMENTAL ANALYSIS PART 2

4. Reading Financial Statements

- a. Understanding Income Statement
- b. Focus points when analyzing a Balance Sheet
- c. The Importance of Cash Flow Statement
- d. Types of Financial Ratios and What they Represent
- e. Review of a Company's Financial Health

5. Valuing a Stock

- a. 2 main methods in evaluating a stock
- b. Relative Valuation Models
- c. Absolute Valuation Formulas
- d. Calculate Intrinsic Value of a Stock
- e. Analysts Estimate and Forward Growth

TECHNICAL ANALYSIS PART 1

1. Introduction to Technical Analysis

- a. Technical Analysis 101
- b. Stock Life Cycle

2. Understanding Candlesticks Charting

- a. Knowing the 3 Major Chart Types
- b. Introduction to Candlesticks
- c. Different Candlestick patterns
- d. Explaining Price Movement using Candlesticks

3. Interpreting Price Volume Action

- a. Bridging the link between Volume and Price Action
- b. Spotting accumulation and distribution
- c. Volume Analysis during pullbacks and price breakouts

4. Identifying Key Price Zones

- a. Key Support and Resistances Levels
- b. Why are Price Gaps Important
- c. How to Use Moving Averages

TECHNICAL ANALYSIS PART 2

5. Making Sense of Trading Indicators

- a. How to Use MACD Indicator
- b. How to Use MACD Histogram
- c. Combining MACD and MACD Histogram
- d. How to Use Stochastics Oscillator
- e. Utilizing Relative Strength

6. Planning and Managing a Trade

- a. Identify Price Catalysts
- b. Importance of Risk Management
- c. When to Exit a Position
- d. Executing a Trade Plan