



MY FINANCIAL PLANNER

MFP ENLIGHTENING THE WAY TOWARDS FINANCIAL EDUCATION

Investing Myths & Realities	Why Don't We Learn From History?
Latticework of Mental Models	MS-Excel for Financial Excel/ Financial Modeling
Bond VS Equity Investing	Technical VS Fundamental Analysis
Qualitative VS Quantitative Analysis	Investing Checklist & Margin of Safety
Value VS Growth Stock	Concentration VS Diversification Portfolio

"Give a man a fish and you feed him for a day; teach him how to fish and he'll feed himself for life".

GRAPE COURSE OF FINANCIAL MARKET WITH PARAMJEET REDU

Batch Starting on 9th June, 2018

www.mfp.co.in

WHO ARE WE?

We at MFP advise our customers on their financial matters (Insurance Planning, Investment Planning, and Tax & Estate Planning) & also manage their investment portfolio.



WHAT WE DO?

- 1) Comprehensive Financial Planning
- 2) Goal Based Financial Planning
- 3) Tax & Estate Planning
- 4) Retirement Planning
- 5) Investment Planning
- 6) Insurance Planning
- 7) Knowledge sharing (The Infant Learner: Our Knowledge sharing platform)

HOW ARE WE DIFFERENT?

We set our clients on the right path to prosperity through unbiased advice, focus, discipline, and a process driven methodology. We try our best to ensure that our clients never commit any financial mistake. Over we make every attempt to add value to people, families, and organizations through dedicated effort, continuous learning.

OUR BLOG:

<http://www.mfp.co.in/blog/>

FACULTY



Paramjeet Redu

Paramjeet Redu is the founder of mfp.co.in. Mr.Redu is a **Certified Financial Planner^{CM} and Certified Research Analyst from National Stock Exchange(NSE)**. He also holds an **MBA in Finance**. Paramjeet has around 5 μ j š ® - ; i including financial advisory role, investing coach & financial Planner. He is managing more than 85 portfolios.

SYLLABUS

Module Name	Time
1 - Basics of Investment <ul style="list-style-type: none"> < Concept of Investment, < Investment V/S Speculation < Investment Avenues < The Joy of Compounding 	3 Hours
2 - Introduction to Financial Market <ul style="list-style-type: none"> < Overview of Financial Market < Primary Market & Secondary Market < Live trading < Investing Myths & Realities < Understanding Market Efficiency and its limitation < Equities 	6 Hours
<i>ReviewA</i>	1 Hours
3 - Basics of Ms Excel <ul style="list-style-type: none"> < VLOOKUP , HLOOKUP < SUM Function ,SUMPRODUCT Function , Average Function < SUMIF ,COUNTIF, SUMIFS , COUNTIFS,AVERAGEIF , AVERAGEIFS FUNCTION < Choose Function ,Offset Function , Match function , Index Function < Rank & Dollar Function < Circular Reference Function < Data Validation Function < EDATE Function, MAX, MIN Function , IF Function < Data table Function < What if analysis 	6 Hours

<ul style="list-style-type: none"> < Scenario Analysis Functions 	
<p>4 Time Value of Money</p> <ul style="list-style-type: none"> < Present Value < Net Present Value < Future Value < Types of Annuities < PV,FV,PMT, RATE, NPER Functions on Excel 	3 Hours
<p>5 Return of Portfolio</p> <ul style="list-style-type: none"> < Nominal Rate of Return < Effective Rate of Return < Internal Rate of Return < Internal Rate of Return irregular cash flows(XIRR) < Holding period rate of return < Return relatives < Compounded Annual Growth Rate < Real Rate of return < Tax Adjusted Rate of return 	3 Hours
<i>Review B</i>	1 Hours
<p>Module 6 Fundamental Analysis of Business</p> <p>Generating ideas:-</p> <ul style="list-style-type: none"> < Analysis Approaches:- Top-Down Valuation (EIC Analysis), Bottom up Approach < How to read an annual report <p>Quantitative Analysis:-</p> <ul style="list-style-type: none"> < Analysis of financial statements (Balance sheet, Income statement, Cash flow statement), Common Size Statement, Trend Analysis, Cash Conversion Cycle, Profitability Analysis , Growth Analysis , Liquidity Analysis, FLOAT Analysis) < Dummy Business Case Study <p>Qualitative Analysis:-</p> <ul style="list-style-type: none"> < Creation of Business Model , Understanding the Business-The Basics, Understanding the Business-The Customer Prospective, Assessing the quality of management, Organization Structure, Market Structure, Corporate governance, Understanding < Understanding competitive moats < Key numbers in analyzing moats < Differentiate between great and gruesome business < Assessing the quality of management <p>Valuations Analysis:-</p> <ul style="list-style-type: none"> < Valuation Methodology (Intrinsic Value of shares):- Dividend cash flow method , Absolute Valuations , Relative Valuations < Understanding margin of safety <p>The Final Checklist</p>	39 Hours
<i>Review C</i>	3 Hours
<p>Module 7 Analysing Sectors and Industries</p> <ul style="list-style-type: none"> É Analysing slow growers stocks É Analysing stalwarts stocks É Analysing Fast growers stocks É Analysing Cyclical stocks 	6 Hours

<ul style="list-style-type: none"> É Analysing Turnarounds É Analysing Holding companies É PSU Stocks É Analysing Spinoffs É Analysing Banks & Non Banking Finance Companies (NBFCs) 	
<p>Module 8 Portfolio Analysis</p> <ul style="list-style-type: none"> ◁ Systematic and Unsystematic Risk ◁ Standard Deviation ,Variance , Correlation & Correlation Coefficient , Beta ◁ Constructing a stock portfolio ◁ Concentration vs. Diversification ◁ Return of portfolio ◁ Modern portfolio theory ◁ Portfolio Revision, Portfolio Evaluation , Portfolio Rebalancing 	3 Hours
<p>Module 9 Latticework of mental models. A System for Success</p> <ul style="list-style-type: none"> ◁ Introduction to Behavioural Finance ◁ Anchoring Effect, Confirmation Bias, Authority Bias, Liking Bias, Base Rate Effect, Overconfidence Bias, Contrast-Misreaction Tendency, Do Something Bias, Framing Effect, Status Quo Bias, Social Proof, Reasoning Obedience ◁ Respecting Tendency, Bystander effect, Self Attribution/Serving Bias, Sunk Cost Fallacy, Commitment and Consistency Bias, Incentive Bias, Endowment Effect ◁ Multidisciplinary thinking and building a latticework of mental models 	12 Hours
<p>Module 10 Learning from History</p> <ul style="list-style-type: none"> ◁ Tulip Mania ◁ South Sea Bubble ◁ The UK Railway Mania ◁ The Greatest Depression of 1929 ◁ The Japanese Bubble of 1989 ◁ Harshad Mehta Scam ◁ LTCM Failure ◁ Dot.com Bubble of 2000 ◁ US Housing Bubble 2008 	12 Hours
<p>Module 11 Technical Analysis</p> <ul style="list-style-type: none"> ◁ Introduction to technical Analysis ◁ Candle Charts Analysis:-One candle pattern, Two candle pattern, Three candle patter ◁ Pattern Study:-Support, Resistance, Double top & Double bottom, Gap Theory ◁ Major Indicators & Oscillators:-RSI, Moving Average, MACD, Bollinger Band ,Pivot Points ◁ Trading Psychology ◁ Dow Theory & Elliott way theory:-Introduction of Dow Theory, Elliott wave Concept 	11 Hours
<i>Review D</i>	1 Hours
<p>Module 12 Bond Valuations</p> <ul style="list-style-type: none"> ◁ Money Market Instruments: - (T-bills, Certificate of Deposits, Commercial Papers, Call Money Rate, LAF, MSF) ◁ Types of Bonds, Bond Valuation Basics 	11 Hours

< Macro Economics Indicators < Bond Theorems , Duration & Modified Duration Analysis	
<i>Review E</i>	1 Hours
Module 13 Derivative Techniques < Basics of Forward & Future Market Forward Market & Future Market Pricing < Forward & Future Market Strategy < Option Market < Option Market Strategy	3 Hours
<i>Final Review</i>	3 Hours
Total Time	128 Hours

A case-study based approach will be followed. The goal would be to understand the subject matter better through live examples and cases.

WHAT TO EXPECT FROM THE COURSE

Development of a robust framework for investing, various perspectives while thinking and analysing investment ideas, exposure to a variety of cases and real-life scenarios.

WHAT NOT TO EXPECT FROM THIS COURSE

Tips and investment ideas etc.

WHO CAN APPLY?

Under Graduate Students, Post Graduate Students, Brokers, Advisors, Agents, CA / CS students, CFP^{CM} pursuing candidates.

Apart from the educational background, 3 things would be needed:

1. Love for understanding businesses
2. Ability and willingness to work hard; and
3. A curious mind

Applicants should carefully consider the above points before applying for the course.

Applicants should also note the following:

- < Since this is a case-study based approach, it is a must that you bring your own laptop.
- < Mobile phones may not be allowed in class.

COURSE FEE:

The fee for the course is Rs 12,000 per candidate.

GRAPE COURSE OF FINANCIAL MARKET WITH PARAMJEET REDU

Batch Starting on 9th June, 2018

www.mfp.co.in

DURATION & TIMING:

	Duration	Timing
Batch 1 (Week Days)	11 th June 2018 – 10 th August 2018	Monday to Thursday: 9:00 AM to 1:00 PM
Batch 2 (Weekend)	09 th June 2018 – 02 Sept. 2018	Saturday: 3:00PM to 6:30 PM Sunday: 9:00 AM to 5:00 PM

VENUE:

My Financial Planner (MFP), 1st Floor, SCO-1, Chabhra Complex, Near Braham Kumari Chowk, Mahesh Nagar, Ambala Cantt., Haryana

HOW DO WE GO ABOUT IT?

Please send a mail at mfp.co.in@gmail.com with Grape Course of Financial Market- 2018- as the subject along with a short CV. The last date for applications is June 7th, 2018.

WHAT OUR STUDENTS ARE SAYING

He has all. Make no mistake, he is such a
More often you meet him, more you lo
discuss anything with him. He is deeply im
yet standing tall in the field of equity analys

I guess a major part of his time, energ
money must be going in reading and learnin
He does coach finance, but always remain
for learning. Instead of wishing him good
money or status, I want him to contin
innocent journey for als learning.

-B.B. Goyal Press Reporter, Hindustan Time
Barnala

U 7 h
versatile environment on financial education
learning will certainly help me in taking
financial education and financial goals for
Certain activities with MFP are worth admi
The Infant learner. I had a different view for
market; it was understood as speculation
but after my coaching with MFP my tl
towards equity market is transformed. I
that, stock market is a platform where bus
are traded and hence, one needs to lo
qualitative and quantitative viewpoints of busine

-Shashikant Ray, Hotel Management Stud
Punjabi University, Patiala

"Thank you MFP for providing me an incre
8 #
looked long and hard for a coach-training program
that would emphasize financial education. Aft
what good can be than a great coach who c
found so easily. I had an informative exper
different from what I originally expected. Th
of coaching; solution to particular problem an
self made teaching material gave more clarific

-B.J.Sreejith, Govt. of Ind

material. More than that is the teaching style
vision of the teacher which helps me in g
these tests (Investment Planning, Retire
h

-Ms. Megha, Birla Sun Life Mutual Fund, I

For Further Details:-

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