

General Consulting Format:

- Fundamental Understanding of listed companies in stock markets.
- How index moves impact a particular sector, what should be considered/not considered, prime indices & sectorial indices.
- Fundamental understanding of stock price moves.
- Fundamentals of F&O markets & its implications on general.
- Technical Market Corrections vs Individual support/resistance price moves.
- Keeping track of specific announcements made by the company to exchanges - BSE / NSE.
- Generally followed best practices to maintain statement of accounts from Tax perspective, cross checking executed trades & healthy practices of book keeping for personal purposes.

COST - 2,500 INR

Day Trading Consulting Format:

- Understand of Candle stick charts & most commonly used Chart Patterns
- understanding of statistical overlays - Bollinger bands, RSI, Simple & Exponential moving averages
- Introduction to algorithmic trading & assessment of trades undertaken by HNI's, FII's, Mutual Fund companies.
- Understanding of bulk deals vs block deals & its impacts.

COST - 2,500 INR

Annual Subscription Based Services:

Every Month:

- Investment Portfolio Health Check report - generated every month with daily market action of industry wise summary.
- Specific announcements made by the company to exchanges - BSE / NSE.
- General Industry wide fact checks / rumour mills which needs attention.
- Indicative Stock Price movement summary benchmarked against Price movement across the Industry/sector.
- Expert Analyst Commentary on Stock & Industry sector.

Quarterly:

- Quarterly Balance Sheet health report - with flags for Pros & Cons.
- Analysis on performance of Industry sectors vs individual companies.
- Expert Analyst Commentary on Stock & Industry sector.

Annual:

- Fundamentally Analytical - Annual Consolidated balance sheet report
- Competitor study report across same industries
- Fact check on Industry Wide news - Indian & Global across same industry
- Indicative Stock Price movement summary benchmarked against Price movement across the Industry/sector.
- Expert Analyst Recommendations / Commentary - Buy / Sell / Hold

1 Free Tele Consultation - Subject to Availability of dates, which can be pre-booked in advance. Advisory for clients to re-evaluate their current situation, future goals, assessment of forceable financial risks during the upcoming financial year for the client, Portfolio Re-Construction if required, Assessment on allocation of capital, General advice on your re-arranging of your loan needs & best ways to secure your money.

Optional Elective Consulting:

** In addition to regular, ongoing meetings, it's important to consult with your financial advisor when you anticipate a significant change in your life that might impact your financial picture, such as getting married or divorced, adding a child to your family, buying or selling a home, changing jobs or getting promoted. Anyone can work with a financial advisor at any age and any stage of life. You don't have to have a high net worth; you just have to find the right advise suited to your situation.