

## Suman Adithya Rao's Course based Consulting Format

### What you'll learn

#### Stage 1: Basics of Stock Market - Level 1:

1. Why do companies Opt for IPO & how IPO works?
2. How index moves impact a particular sector, what should be considered / not considered, prime indices & sectorial indices.
3. Why stock prices move
4. How to pick stocks.
5. Difference between Equities & Derivatives (F&O)
6. How Monetary Policy work?
7. How Fiscal Policy work?
8. How interest rates are changed and why this is crucial to understand for successful portfolio building.
9. Cyclical of markets.
10. Impact of local news & Global news / Sectorial news & it's impact on individual stock.

#### Stage 2: Basics of Stock Market - Level 2:

1. How to create your portfolio
2. How to manage a portfolio.
3. How to Hedge your portfolio
4. How to pick mutual funds
5. Identify crucial catalysts (timed events) in order to know when the optimal time is to buy or short a stock.
6. How do you asses risk from company's point of view ?
7. Why & How do you need to value companies.
8. Trading Psychology & it's impact.

#### Course Cost:

##### **Basics of Stock Market Inclusions:**

Stage 1, Stage 2 + Optionals Stage 5, Stage 6 (unguided).

Session Duration - 1.5 hours - 2 hours

Cost - 2,000 Rs INR

### **Stage 3: Data Collection & Applied Analytics:**

Finding Data - Know where to get data in order to build a financial model (in depth understanding of identifying and using/navigating the best free websites and sources to build your financial model)!

### **Stage 4: Analysing Fundamentals & Technicals of Stock Markets:**

1. Fundamental Analysis
2. Value companies using several different valuation methodologies by way of key Financial Ratio's.
3. Technical Analysis
4. Understanding Moving Averages, Charts & using statistical overlays to analyse price movements of stocks.

### **Stage 5: Holy Grail:**

1. Types of Portfolio's:
2. Aggressive portfolio
3. Conservative portfolio
4. Moderate portfolio

### **Course Cost:**

#### **Stock Market Advanced Inclusions:**

Stage 3, Stage 4 + Optionals Stage 5, Stage 6 (unguided).

Session Duration - 2 hours

Cost - 2,500 INR

### **Stage 6: Introduction to World of Investing:**

Brush your knowledge through exclusive online courses on [moneyNmoney.com](http://moneyNmoney.com) & Ask Questions (within 15 days from Consulting date, with prior appointment at-least 2 days before the chosen date):

1. Analyze and understand - Equity Market & Its Terminologies.
2. Analyze and understand - Basics of Profit & Loss Account.
3. Analyze and understand - Basics of Balance Sheet.

### Course Cost:

Stage 6 (Guided Session):  
Session Duration - 1.5 hours.  
Cost - 1,500 Rs INR

### Topics which we may not discuss:

Tax Saving Investments, Which mutual fund to invest, Which stock to invest, Daily / weekly stock calls, Care take/maintain your stock portfolio, Wealth Management, FD rates offered by banks, Comments on Politics...

### NRI Investment Consulting:

Guided session exclusively for NRI's which covers – explanation on benefits of Investing in Mutual Funds in India, Procedures, Basics of NRI taxation principles, guidelines on fund houses that accept NRI's Investments as per FATCA (Foreign Account Tax Compliance Act)  
Stages & Stage fees mentioned above remains the same.

**Note:** This course is subject to availability & based on revision criteria's set by government of India from time to time.

**Cost – 2,000 Rs INR**

**Note:** Stage 6 you can choose between guided & unguided sessions based on how comfortable you are. Unguided sessions – you can go through the courses manually & clear any doubts you may have on phone with in 15 days from date of consultation. Alternatively you can choose guided session for Stage 6 – which are guided with example based face to face interaction to effectively learn & implement.

Payment Link : <https://p.paytm.me/xCTH/mm7k05du>



## **General Consultation For Intermediates With General Familiarity Of Business & Stock Markets :**

### **General Consulting Format:**

1. Fundamental Understanding of listed companies in stock markets.
2. How index moves impact a particular sector, what should be considered/not considered, prime indices & sectorial indices.
3. Fundamental understanding of stock price moves.
4. Fundamentals of F&O markets & its implications on general.
5. Technical Market Corrections vs Individual support/resistance price moves.
6. Keeping track of specific announcements made by the company to exchanges - BSE / NSE.
7. 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:**

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

COST - 2,500 INR

**Upcoming : Below service in is grey inactive & listed purely for promotional purposes.**

**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 Subscription Based Services:**

**Every Month:**

1. Investment Portfolio Health Check report - generated every month with daily market action of industry wise summary.
2. Specific announcements made by the company to exchanges - BSE / NSE.
3. General Industry wide fact checks / rumour mills which needs attention.
4. Indicative Stock Price movement summary benchmarked against Price movement across the Industry/sector.
5. 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. Asses your need early & work with a financial advisor at any age and any stage of life. You just have to find the right advise that suites to your approach to finance & address the need of the situation you are in.

**Mentor's Note:**

*Learnings in stock markets must come with a deep sense of understanding to effectively implement. Only when you learn Investing as a skill set, it can be bear an effect across your financial decisions. Every person is different & has their own patterns of learnings & have their own set of take aways from all that they learn.*

*Hence in the best interest of leaning – it's best advised to come prepared for any session with an intention to seek knowledge & understand better by way of reasoning / asking relevant questions. Objective is achieved only when – Face to face conversations leaves a true sense of understanding to my clients & to me – it gives me job satisfaction of being understood. Looking forward to meet you! Thank you!*

**– Suman Adithya Rao**

**Founder, [moneyNmoney.com](http://moneyNmoney.com)**

<https://www.moneynmoney.com/about-suman-adithya-rao/>

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**Zero's matter!**

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