FUNTECH ACADEMY / COURSE GUIDE

1-TO-1 STOCK MARKET COURSE

Detailed Course Syllabus

Explore the complete learning plan across **three structured levels.**

01 **Stock Market Foundation**
Build the basics

02 **Stock Research & Analysis**
Learn the research process

03 **Portfolio Management**
Manage investment decisions

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LEVEL 01

Stock Market Foundation

Build a strong base before moving into stock selection and portfolio management.

01 Investment Basics

- Different assets available for investment
- Why invest in the stock market?
- What is a stock exchange?
- Understanding market capitalisation
- Basic understanding of large-cap, mid-cap and small-cap stocks

02 Trading & Demat Accounts

- What is a Trading account?
- What is a Demat account?
- Difference between Trading and Demat accounts
- Traditional broker vs discount broker
- Basic understanding of stock orders

03 Market Price Movements

- Upper circuit and lower circuit
- Difference between investing and trading

04 Target & Risk Management

- What is a Target?
- What is a Stop-Loss?
- What is a Trailing Stop-Loss?
- What is a GTT order?

05 Corporate Actions

Understand how common company actions affect shareholders:

- Dividends
- Bonus shares
- Rights issues
- Buybacks
- Stock splits

Stock Market Foundation

LEVEL 01 / CONTINUED

06 Capital Gains

- What are capital gains?
- Long-term capital gains
- Short-term capital gains

07 Basic Technical Analysis

Technical analysis will be used only to improve investment decisions.

- TradingView setup
- Resistance
- Bearish engulfing
- Support
- Bullish engulfing
- Trailing Stop-Loss

LEVEL 01 COMPLETE | NEXT: LEVEL 02

LEVEL 02

Stock Research & Analysis

Learn how to identify good opportunities and analyse a company before investing.

01 Finding Good Stock Ideas

Learn where investment ideas can come from:

- Market news
- Quarterly result screeners
- Bulk and Block Deals
- FPI sector data
- Company announcements
- Volume and delivery data
- FII and DII activity
- Value investing opportunities in stocks, sector ETFs and mutual funds

The objective is to find growth and value investment opportunities through research instead of depending on tips.

Stock Research & Analysis

LEVEL 02 / CONTINUED

02 Sector Analysis

Learn how to understand whether a sector is strong, weak or improving.

- Sector performance vs Nifty 50
- FPI buying and selling by sector
- Interest-rate impact
- Government policy impact
- Regulatory changes
- Commodity-price impact
- Revenue and margin trends across the sector

03 Understanding the Company's Business

Before investing, understand how the company actually makes money.

- Products and services
- Revenue sources
- Main customers
- Country-wise revenue
- Client concentration
- Government dependency
- Regulatory risks
- Business-model risks

04 Institutional Activity

Learn how to understand the activity of large investors.

- Bulk Deals
- Block Deals
- FII buying and selling
- DII buying and selling
- Promoter buying and selling
- Institutional holding changes
- Institutional accumulation and distribution

You will also learn why every large transaction is not automatically a positive signal.

05 Valuation & Buying Price

A good company can still be a poor investment if bought at a very high price.

- Current price vs 52-week high
- Current price vs historical levels
- P/E ratio
- P/E vs sector
- P/E vs 5-year median
- PEG ratio
- Valuation compared with expected growth
- Whether the stock has already risen too much

Stock Research & Analysis

LEVEL 02 / CONTINUED

06 Finding Growth Catalysts

Understand what can drive future business and earnings growth.

- Large new orders
- New plants
- Price increases
- Government policy benefits
- Capacity expansion
- Regulatory approvals
- Earnings recovery
- Strong order books

You will also learn to check when the expected catalyst may start contributing to earnings.

07 Quarterly Result Analysis

Learn to analyse results beyond only looking at net profit.

- Revenue growth
- Net profit
- Cash flow
- Operating leverage
- EBITDA
- Other income
- Debt
- Capex
- Operating margins
- Expenses
- ROCE
- Management guidance

You will learn to identify whether profit growth is coming from the core business or from one-time items.

08 Management Commentary & Concall Analysis

Learn how to understand management's view about the future.

- Old guidance vs new guidance
- Margin guidance
- Delayed projects
- Management confidence
- Revenue guidance
- Capacity utilisation
- Recovery timelines
- Risks mentioned by management

09 Banks & NBFC Analysis

Financial companies require a different method of analysis.

- GNPA
- CASA ratio
- Asset quality
- Net NPA
- ROA
- Growth quality
- NIM
- PBV

Stock Research & Analysis

LEVEL 02 / CONTINUED

10 Delivery & Volume Analysis

Learn how price movement and delivery data can provide useful clues.

- High delivery + rising price
- High delivery + falling price
- Low delivery + rising price
- Low delivery + falling price
- Delivery near 52-week highs and lows
- Seller exhaustion
- Possible accumulation
- Possible distribution

11 Technical Analysis for Investors

Use technical analysis mainly for better entry, exit and risk control.

- Fibonacci retracement
- Price alerts

The focus remains on investing, not intraday trading.

12 IPO Analysis

Learn how to study newly listed companies.

- Fresh issue vs OFS
- Why the company is raising money
- Promoter selling
- Promoter intention
- Risks in newly listed stocks

LEVEL 02 COMPLETE | NEXT: LEVEL 03

LEVEL 03

Portfolio Management & Investment Decisions

Learn how to manage investments after stock research is completed.

01 Position Sizing

Learn how much money should be allocated to each stock.

- Core positions
- Tactical positions
- Satellite positions
- Maximum stock allocation
- Maximum sector allocation
- Cash allocation

LEVEL 03 / CONTINUED

Portfolio Management & Investment Decisions

02 Portfolio Construction

Learn how to build a balanced portfolio.

- Number of stocks
- Single-stock exposure
- Diversification
- Risk before adding a new stock
- Sector concentration
- Similar business risks
- Cash management

03 Complete Buy Plan

Before investing, create a clear written plan.

- Stock name
- Allocation
- Investment reason
- Catalyst timeline
- Exit condition
- Entry price
- Position type
- Expected catalyst
- Risk level

04 Exit Strategy

Learn when the original reason for holding a stock has changed.

- Fundamental weakness
- Guidance cuts
- Regulatory problems
- Sector weakness
- Change in the original investment thesis
- Falling margins
- Promoter pledge
- Catalyst failure
- Institutional selling

05 Profit Protection

Learn how to manage a stock after strong gains of 30%, 50%, 80%, 100% or more.

- Continue holding
- Reduce allocation
- Review the investment reason again
- Tighten risk
- Protect profits

LEVEL 03 / CONTINUED

Portfolio Management & Investment Decisions

06 Quarterly Portfolio Review

Learn how to review every investment regularly.

- Quarterly results
- Margins
- Business performance
- Sector condition
- Original investment thesis
- Revenue and profit growth
- Management guidance
- Institutional activity
- Expected catalyst
- Exit conditions

07 Combining Fundamental & Technical Analysis

Learn how different methods work together.

- Fundamentals help identify the right company
- Valuation helps decide whether the price is reasonable
- Technical analysis helps improve entry and exit
- Position sizing helps control risk
- Quarterly review helps decide whether to continue holding

08 Building Your Own Investment Process

By the end of the course, you will learn to follow a structured investment process:

01 Find an Idea
02 Check the Sector
03 Understand the Business
04 Analyse Financials
05 Review Management Guidance
06 Identify the Growth Catalyst
07 Check Valuation
08 Decide the Entry Price
09 Decide Allocation
10 Create a Buy Plan
11 Monitor Results
12 Protect Profits
13 Review or Exit When the Reason Changes