



Introduction to the Markets & Practical Investing

Invest Academy

Learn to invest from the professionals.

www.investacademy.com +1.212.784.6476

Course Details:

- Duration:** 28 Hours
(7 Evening Sessions)
- Level:** Beginners
- Prerequisites:** None
- Tuition** ~~\$2,800~~ \$1,800
- Locations:** New York, NY
Summit, NJ

Course Highlights:

You Will Learn & Practice:

- Discover the secrets and fundamentals of investing in stocks, bonds & mutual funds.
- Mastering the lingo of investments when talking with friends on gathering events
- Learn how to use free & powerful online tools for research and analysis
- Learn how to avoid mistakes & pitfalls that common investors makes
- Instructors are experienced investment professionals with real world examples & case studies
- Personal attention and small classes with up to 10 students in a class -guaranteed.

In this syllabus:

Introduction 1

Learning Outcomes 1

Agenda 2-4

Special Bonuses 5

Details & Registration 5

Overview

Introduction to the Markets & Practical Investing is specially designed to teach both beginning and experienced investors about the secrets of the capital markets, how to find a good investment opportunities and manage their portfolios.

In this course we will put an emphasis on the practical aspects of investing your money, without abandoning important theoretical and fundamental subjects that we believe every investor should know in order to understand how the financial markets and especially the stock market works.

It is an effective integration of understanding the markets fundamentals, disciplined investing approach, practical instructional techniques and use of free web tools and resources to improve your performance and make money.

The course is very unique in many aspects, mainly since it gives to our students a practical tools and knowledge they won't find in many other courses or instant workshops.

Some of the practical tools the students will enjoy:

- > Analysis and case studies of current events in the market in accordance to the learned material
- > Working with trading platforms & technical analysis tools used by Wall Street professionals
- > Step by step methodical process for screening, evaluating and buying/selling stocks

Brief Curriculum:

Part 1: Investing in Stocks

Part 2: Analyzing Stocks

Part 3: Trading Securities

Part 4: What's Moving the Markets

Part 5: Introduction to Fixed Income

Part 6: Mutual Funds

Part 7: Portfolio Management, Risk & Psychology

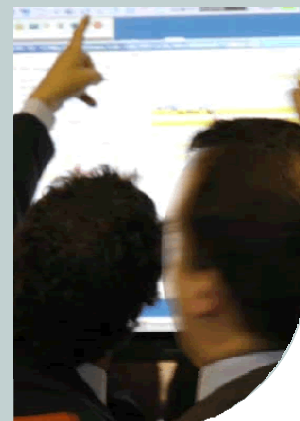
Small Groups

We believe that personal attention and tutoring is the most effective way to help you understand the material and succeed. Therefore, each class has a high teacher to student ratio (up to 10 students in a class, guaranteed) to give to our students personal attention, training and depth of knowledge they need to be successful investors.

Learning Outcomes

At the end of the course participants will be able to:

- Find the most promising stocks & identify the stocks you should avoid
- Read technical patterns & indicators and generate buy/sell signals
- Build and track a portfolio of stocks and mutual funds
- Determine your tolerance for risk and learn to avoid common mistakes
- Learn to efficiently use free web tools for research and analysis.
- Choosing broker and execute trades



Course Agenda

Part 1 ***Investing in Stocks***

Part 2 ***Analyzing Stocks***

Part 3 ***Trading Securities***

Part 4 ***What's Moving the Market?***

Part 5 ***Introduction to Fixed Income***

Part 6 ***Mutual Funds***

Part 7 ***Portfolio Management, Risk & Psychology***

Part 1

Investing in Stocks

Stocks versus other investments, the wonders of compounded interest, cutting the market into sectors and industries slices, investing for the long run

- | | |
|---|------------------------------------|
| 1.1 Owning company's shares | 1.5 Exploring industries & sectors |
| 1.2 Why companies go public? | 1.6 Dividends & stock split |
| 1.3 Advantages & disadvantages of owning stocks | 1.7 The magic of compounding |
| 1.4 Types of stocks | 1.8 Why stocks perform the best |

Part 2

Analyzing stocks

Two approaches to analyzing stocks: analyzing growth & value (the fundamental school) and analyzing patterns of price movements (the technical school)

- | | |
|--|---|
| 2.1 Fundamental analysis <ul style="list-style-type: none">2.1.1 The income statement2.1.2 The balance sheet2.1.3 Using multiples and financial ratios2.1.4 Understanding value investing principles2.1.5 Importance of growth on stock performance2.1.5 Sorting out the public filings | <ul style="list-style-type: none">2.2.4 Channel lines2.2.5 Bounce & retracement2.2.6 Price gaps2.2.7 Resistance & support2.2.8 Price patterns2.2.9 Moving averages2.2.10 Recognizing reversals with candlestick chart |
| 2.2 Technical analysis <ul style="list-style-type: none">2.2.1 Basic concepts of technical trading2.2.2 What is trend?2.2.3 Chart types: Close, Bar, Candlesticks | <ul style="list-style-type: none">2.2.11 Fibonacci Numbers2.2.12 Volume and technical analysis2.2.13 Using the internet for analyzing your stocks |

Part 3

Trading Securities

Learn how to buy and sell stocks, how the stock exchanges work, and how to choose your broker.

3.1 Getting started

- 3.1.1 Price quotes
- 3.1.1 Types of orders
- 3.1.2 Buying on margin
- 3.1.3 Shorting stocks
- 3.1.4 Reading the stocks tables

3.2 How to make money at opening and close

3.3 How the NYSE work?

3.4 How the NASDAQ work?

3.5 Using ECNs

3.6 Brokerage Firms—Choosing the right broker for you and what your broker won't tell you

3.7 10 Rules for executing better trades

Part 4

What Moving the Markets

The Economy, The Players & the News. How to interpret the economic indicators, knowing the key players in the market and how they move it; What are the important news events you should look for.

4.1 The Federal Reserve & FOMC

4.2 Major economic indicators & news

- 4.2.1 Consumer confidence, CPI, Beige book
- 4.2.2 Industry-oriented indicators
- 4.2.3 Commodities & Currency price movement

4.3 The key players in the market

- 4.3.1 Insiders
- 4.3.2 Institutions
- 4.3.3 Hedgers & Arbitrage players
- 4.3.4 Individual Investors & Day Traders

4.4 Interpreting Financial News

- 4.4.1 Understanding & using live financial news that moves the market (i.e. CNBC, MarketWatch)
- 4.4.1 "Noise" Versus Newsworthy events

4.5 Key Company's Events

- 4.5.1 Earnings surprise & Future Guidance
- 4.5.2 Analyst Upgrades/Downgrades
- 4.5.3 Takeover Bids

Part 5

Introduction to Fixed Income

The basics of bonds, how to invest in them and the affect on the stock market.

5.1 Bonds Basics

- 5.1.1 The lifespan of a bond
- 5.1.2 Interest vs. Discount
- 5.1.3 Relationship of price to yield

5.2 Corporate bonds

- 5.2.1 Why companies issue bonds?
- 5.2.2 Credit quality & Bond Rating
- 5.2.3 High yield bonds

5.3 Government Bonds

- 5.3.1 Treasuries & T-Bills
- 5.3.2 The yield curve
- 5.3.3 How to read the Govt. bonds tables?

5.4 Bonds yield and other investments

- 5.4.1 Govt. bonds yield and your mortgage
- 5.4.2 Relationships between Gov. bonds yield & The stock market

Special Bonuses to Our Students

Class Material Binder & CD

Each student will receive a binder with all class slides and material printed. The printed slides has room to write notes. Also included are class exercises, handouts and CD with graphics and charts. All material is organized by the order of classes.



Repeating Classes

Missed a class? Want a better understanding of certain subject you learned on class? You may retake the course as many times as you would like for a whole year. Just fill online form which Class or classes you would like to attend and when, and we will book your seat (based on available seats).

Membership

Graduation from courses does not stop our relationship. Our graduate students will receive access to our special investors forum, where you can ask questions and exchange ideas with instructors and other investors like you. We will also invite you to participate in our annual conference, free of charge.



Invest Academy — NYC Campus

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Directions:

All classes will be at our Broadway Class in midtown Manhattan, walking distance from the major Trains and Bus stations in NYC.

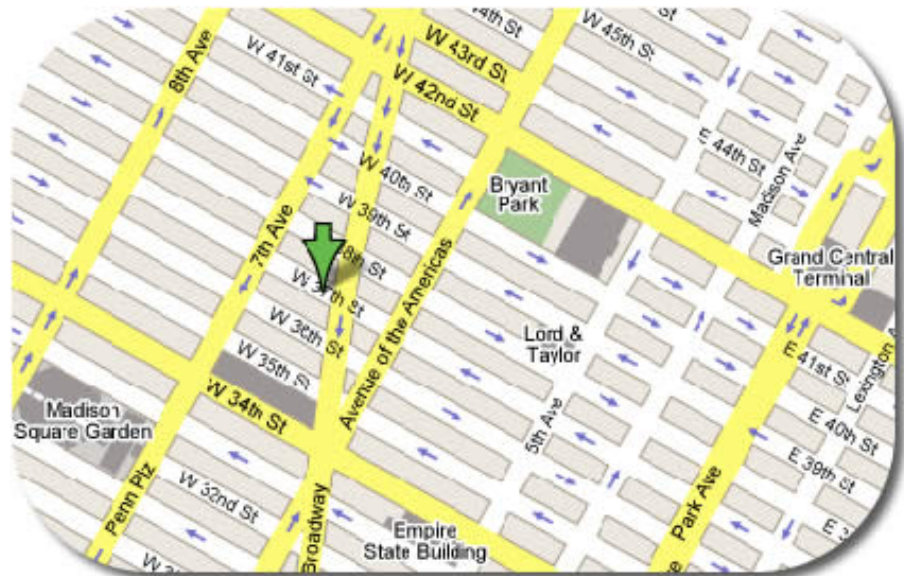
Our Address:

1375 Broadway, 3rd floor (on Broadway & 37th St.)

From Times Square: Walk 4 blocks south on Broadway

From Penn Station: Walk 3 Blocks north. From 37th St. walk 1 block east

From Herald Square: Walk 3 blocks north on Broadway



Payment Options:

- Cash
- Check
- Major Credit Cards



- Q** **N** **R** **W** Herald Square or Times Square
- 1** **2** **3** Penn Station or Times Square
- B** **D** **F** **V** Herald Square
- A** **C** **E** Herald Square or Times Square
- 7** **S** Times Square

LIRR (Penn Station), **NJ PATH** (Herald Square)

For further information on the course and Invest Academy, visit: www.investacademy.com