

## Fundamental Analysis – Equity & Debt – a practical perspective

<p><b>1. Intro to Economy /Financial Markets, Company Lifecycle</b></p> <ul style="list-style-type: none"><li>• Economic flow</li><li>• Company lifecycle</li><li>• Industry and business cycles</li><li>• Business Models</li><li>• Start-up / Growing /Mature/Declining</li></ul>
<p><b>2. Funding Options</b></p> <ul style="list-style-type: none"><li>• Equity v/s Debt funding</li><li>• Angel/VC/PE/IPO/Banks/AIFs</li><li>• Bank Funding – types of bank facilities</li><li>• Structured Finance</li></ul>
<p><b>3. 'Risk' Concepts / Risk Management</b></p> <ul style="list-style-type: none"><li>• Risk v/s Return</li><li>• Types - Market Risk / Credit Risk /Operational Risk</li><li>• Evaluation and measurement of Risk</li><li>• Mitigation of Risk / Balanced Portfolio etc</li></ul>
<p><b>4. Fundamental 'Return' concepts</b></p> <ul style="list-style-type: none"><li>• Time Value of Money</li><li>• Compounding magic</li><li>• NPV/IRR / Measuring Return</li><li>• Expected Return – CAPM / Credit Spread</li></ul>
<p><b>6. Intro to Financial Statements</b></p> <ul style="list-style-type: none"><li>• Income Statement</li><li>• Balance Sheet</li><li>• Cashflow</li><li>• Case Study - Allied - computer lab</li></ul>
<p><b>7. Live Annual Reports</b></p> <ul style="list-style-type: none"><li>• Colgate India</li><li>• Bata India / Tata Steel/ Khadim with Debt</li><li>• Zomato?</li></ul>
<p><b>8. Industry/ Business Analysis</b></p> <ul style="list-style-type: none"><li>• Fundamental Analysis</li><li>• Equity valuation / Credit Analysis</li><li>• How is it different from Technical Analysis</li></ul>
<p><b>9. Fundamental analysis - case study</b></p> <ul style="list-style-type: none"><li>• Working with a Live company</li><li>• Broker report - walkthrough</li><li>• Rating rationale - walkthrough</li></ul>
<p><b>10. Importance of soft skills</b></p> <ul style="list-style-type: none"><li>• Communication &amp; presentation</li><li>• Networking / Linked In profile / Connections</li></ul> <p><b>Building your Resume</b> Skill highlighting</p> <ul style="list-style-type: none"><li>• Do's and Don'ts - Sample Before and After</li><li>• Common mistakes</li></ul>

