



RIVIERA PARLIAMENT INVESTMENT CLUB!



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Analyzing A Stock

- Industry, sector & type
- 52 week high/low
- Market cap
- Dividend Yield
- Net Income
- Return on equity TMM / Return on equity 3 years
- Earnings per share
- P/E, P/E vs. industry
- Price/Book, Price/Book industry
- Debt/Equity, Debt/Equity Industry
- PEG
- Cash Flow from Operations / Free Cash Flow
- Standard Deviation
- Total return YTD/ 3 Months
- Description / News
- Revenue/ Total operation expense
- Net income
- Style
- Share short/ percentage short/ Shares short previous month
- **Mangers resume**
- **News**
- **Main Competitors**

Analyzing a Mutual Fund / ETF

- Name
- Category
- Benchmark /index
- Performance against the benchmark
- Number of holdings
- Mix of assets
- Cost
- Standard Deviation
- Average return (mean)
- Sharpe
- Alpha
- Beta
- Tenure

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Constructing a portfolio

- Figuring out the risk tolerance.
- Choosing the asset classes.
- Choosing the individual holding – who is best of breed.
- Studying how it all mixes up together using a Morningstar report.

Monitoring

- **Daily** – snapshot each individual stock / ETF / Mutual fund.
- **Weekly** - cash positions and different indices.
- **Monthly/Quarterly** – reevaluating the entire portfolio

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Thank You.

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