



Investing Basecamp

Invest successfully with clear goals



Workshop Content

3 Sessions of 3h on Saturdays

Session 1: Key concepts and investing goals

Session 2: How to pick the right investments

Session 3: Manage your portfolio

Advantages of taking this workshop

Hands on workshop with a lot of practical experience

Don't waste time with useless theory

Benefit from live exchange with other students and the coach

Focus on key aspects to get your investing activity started quickly

Theory Block 1pm - 2pm

- **The universe of investing and asset classes**
 - What are the main investable asset classes?
 - Key differences between asset classes
 - Focus on Equity securities
- **Key concepts about investing**
 - Time value of money
 - How to measure returns
 - Measures of risk
- **How to invest with a plan**
 - Determine your risk tolerance
 - Understand your needs and constraints
 - Examples of investor profiles

Practice Block 2:15 pm - 4:15pm

- **Evaluate your risk profile**
 - Take risk profile test
 - Discussion of results
- **Define your investment goals**
 - Self evaluation
 - Define investment strategy
 - Discussion

To prepare for session 2 : find 2 or more securities that you like, post your tickers in the group at least 48h before next practice

Theory Block
1pm - 2pm

- **How to pick good stocks**
 - Key metrics and their application
 - Example with one growth stock and one value stock
- **How to pick the right ETF**
 - Key metrics and their application
 - Example with Blockchain ETFs

Practice Block
2:15 pm - 4:15pm

- **Research selected securities and make a short sales pitch**
 - Security screening
 - Security selection and pitch preparation
 - Pitching
- **Discussion**
 - Feedback on pitches
 - Vote on which securities to add to our virtual portfolio

To prepare for session 3: Open an account with an online broker and / or an account on the simulation platform. Inform your coach which broker you are using at least 48h before class.

Theory Block 1pm - 2pm

- **How to evaluate the performance of your Investments**
 - Learn how to measure performance of your investments
 - Understand how to achieve diversification benefits
 - Other portfolio risks
- **When to rebalance your portfolio**
 - Passive and active portfolio strategies
 - Strategy execution with online brokers

Practice Block 2:15 pm - 4:15pm

- **Select and buy securities**
 - Ways to buy and sell securities with your online broker
- **Trading Simulation**
 - Execute and evaluate trades
- **Identify and use portfolio management tools**
 - Try out tools available with your broker or external tools
 - Discuss portfolio tools with other group members

Don't forget at the end of the workshop: Join our investment pitching group and keep exchanging with other group members on investment opportunities!