

Syllabus/Curriculum

The Problem

- An Information Avalanche
- Filtering Out the Noise
- “You Have No Friends on Wall Street”
- What Does Today’s Investor Need?

Stocks—Vital Fundamental Factors

- The Only Profitability Measure You Need
- “GARP”
- Timeliness
 - Finding and scoring these factors

Mutual Funds—Vital Fundamental Factors

- The Point of the Sharpe ratio
- Alpha
- Expense Ratios
 - Finding and scoring these factors

Trend Analysis: The Point and Figure Method

- How a P&F chart works
- Buy and sell signals
- The Major Trend
- Relative Strength
 - Finding P&F charts on-line
 - Scoring the chart signals
 - Adjusting charts for mutual funds

Pulling It All Together

- Your Investment Scorecard
- Evaluating the Scorecard
- Monitoring the Scorecard