

# **Workshop: Introduction to Value Investing**

## **We Open New Doors for Your Stock Investing**

### **Syllabus**

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#### **Workshop Description**

This workshop will introduce you to the exciting world of self-directed value stock investing. Why should you care? Because people invest in stocks (especially via mutual funds) every day with absolutely no idea what those stocks are worth. Instead, they pay whatever price the market demands and hope for the best.

Contrarian value investors know there is a way to value a company and then compare the *value* to the *price* available at the daily stock market auction. We buy when price is below value, and sell when the price exceeds the value to meet our investing goals over time.

The workshop will integrate the three elements of master value investors:

#### ***Data***

- a. How to identify quality companies with a track record of fundamental growth.
- b. How to value quality companies - and then compare valuation to the stock price.
- c. How to construct an investment portfolio to meet your needs.
- d. Where to look for possible investment ideas.

#### ***Know the Company Story***

- a. How to research a company so you recognize how the company is performing -- regardless of the stock price.

#### ***Know Thyself - Investor Psychology***

- a. How to manage your emotions so you can create a portfolio of individual value companies and avoid misjudgement and misaction.

(Most importantly---getting together and working on stocks is fun!!).

#### **Learning Goals**

At the end of the workshop, participants will know how to:

- Identify companies with 10-years of proven financial growth
- Use existing data to determine a reasonable valuation for predictable companies
- Construct an investment portfolio to achieve financial goals
- Learn where to look for potential investment ideas
- Practice researching a company so you understand the company story
- Recognize psychological and emotional biases that impact personal investing

## **Workshop Structure - 3 Interactive Zoom Sessions**

3 workshop sessions will be conducted over 3 evenings via Zoom. (Consecutive evenings or at least the same week).

Session will begin at 7:30 pm CST and last 90 minutes. Sessions will start on time, follow an agenda, and end on time. Whether sessions are recorded is to-be-determined.

Sessions will be highly interactive, real-time, and deal with real companies and real stock market action – so participants must have microphones and video cameras on.

***To maximize our interactive time together during each session, participants will be required to watch brief videos (8-15 minutes each) prior to each session.***

### **SESSION 1: “Price vs Valuation”**

**Before Session 1, participants must take action:**

1. Get access to ValueLine Investment Survey via an urban library or buy a subscription.
2. Study 2 different videos:  
Video 1A: Introduction to Contrarian Value Investing  
Video 1B: The Investing Process  
Video 1C: Introduction to ValueLine PDF reports

#### **Session 1 Agenda (90-minute live session)**

Session Purpose: Practice valuing a company and determine buy, sell, hold target ranges.

45 minutes:

- Practice reading a ValueLine report for 10 years of growing fundamentals
- Determine the forward PE for the company
- Calculate a normal PE for the company
- Complete a reasonable valuation for the company
- Assess past “should have bought” and “should have sold” moments
- Form a conclusion: Buy, Sell, Hold?

5 minute Break

35 minutes:

- Participant chime in: group select a company and we work through a valuation together

5 minutes:

- Discuss goals for Session 2

Adjournment

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### **SESSION 2: “Getting Started”**

**Before Session 2, participants must take action:**

2. Study two different videos:  
Video 2A: First Steps for Portfolio-Building  
Video 2B: Where to Look for Candidate Companies

### **Session 2 Agenda (90-minute live session)**

Session Purpose: Learn how to get started and where to look for ideas. Also practice a company valuation.

45 minutes:

- Q+A from last session
- Discuss getting started with building a portfolio
- Group discussion: where to look for ideas/how to use sources for ideas

5 minute Break

35 minutes:

- Group select a company and practice valuation process.

5 minutes:

- Discuss Goals for Session 3

Adjournment

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### **SESSION 3: “Know the Company; Know Thyself”**

**Before Session 3, participants must take action:**

2. Study two different videos:

Video 3A: Know the Company Story

Video 3B: Know Thyself

### **Session 3 Agenda (90-minute live session)**

Session Purpose: Learn how to study a company to know what to expect. Recognize the personal psychological forces that must be managed.

45 minutes:

- Q+A from last session
- Learn how to build a company story
- Personal psychology filters

5 minute Break

35 minutes:

- Group select a company and practice valuation process.

5 minutes:

- Q+A and Next Steps going forward

Adjournment

### **Facilitator Contact Information**

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Reminders:

- I am not a licensed financial advisor -I do not know your financial circumstances
- I am offering no advice whatsoever
- All information presented is solely for entertainment
- Your investing decisions are yours and yours alone - true financial freedom!

### End###