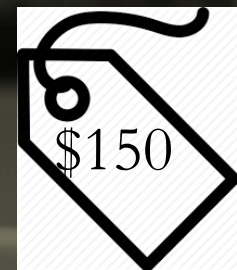




INVESTING FOR BEGINNERS

By Adib Motiwala



8 sessions (each session is 90 minutes) for \$150 total

Starts June 6, 2021

Sundays @3 PM Central Time via Zoom

Limited Spots. Register at <http://bit.ly/investing-basics>

About Adib Motiwala



Adib Motiwala is a professional investor and is the managing partner of Motiwala Capital, a Registered Investment Advisor in Irving, Texas. He has been investing in the US since 1999 and managing clients' capital since 2011. He is an MBA from the University of Texas at Dallas and has a Masters degree in Computer Science from Texas A&M University.



Who should take this course?

- Almost everyone over the age of 15 can understand and benefit from this course
- Covers basic investment literacy concepts that everyone needs to be aware of
- Passive investors
- Active investors

Prerequisites

- Interested in Investing and Personal Finance
- Inquisitiveness and hunger to learn

What is part of the course?

- Live sessions via Zoom (Zoom link will be provided post registration)
- Private Slack group for attendees (Invites will be extended after session 1)
- Free research tools
- Discounted research tools

Investing for Beginners

Week 1

What is Investing?
Asset Classes

Week 2

Types of Investment
Accounts (USA)
Mutual Fund Selection

Week 3

Finding investment ideas
Fundamental Research
Valuation Methods

Week 4

Halal Screeners
Other tools

Week 5

Learning from Legends
Peter Lynch framework

Week 6

Introduction to Financial
Statements
Dividend Investing

Week 7

Portfolio Construction
and Maintenance

Week 8

Portfolio Presentations

Class Schedule

Eight 90-minute sessions, Sunday 3 PM CST

Week	Date	Topic
Week 1	6/6	What is Investing? Asset Classes
Week 2	6/13	Types of Investment Accounts (USA) and Mutual Fund Selection
Week 3	6/20	Finding investment ideas, Fundamental Research Using Value Line and M*, Valuation methods
Week 4	6/27	Halal Screeners, Other screeners and tools
Week 5	7/11	Learning from Legends, Peter Lynch framework
Week 6	7/18	Introduction to Financial Statements, Dividend Investing
Week 7	7/25	Portfolio Construction and Maintenance
Week 8	8/1	Portfolio Presentations

Session Details

Week 1

Asset Classes: Stocks, Bonds, Sukuk, Real Estate, Commodities, Cash

Classes of Stocks

Structure of a Company

Reading Assignment

Week 2

Investment Accounts: 401(K), IRA, Roth, ESA, 529

Understanding ETFs/Mutual Funds and their selection

REITs, Options

Websites for research

Session Details

Week 3

Idea Sourcing

Using Value Line

Using Morning Star

Valuation methods

Week 4

Halal Screeners

Evaluating Mutual Funds and ETFs for Shariah Compliance

Other tools

Discussion on Project (TBD)

Session Details

Week 5

Learning from Legends – Buffett, Lynch, Templeton, Munger

Peter Lynch framework

Examples

Discussion on what is a “good” business vs “mediocre” business

Week 6

Introduction to Financial Statements

Dividend Investing

Tax Implications

Tools for Financial Statement Analysis

Session Details

Week 7

60/40 Portfolio

Portfolio Construction and Position Sizing

Portfolio Maintenance

Week 8

Presentations (TBD)

Q/A



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REGISTER at <http://bit.ly/investing-basics>
Email Inquiry: adib@motiwalacapital.com