



Equity Research Initiative

Phase 4: Stock Pitch

Objective:

- *To summarize your analysis of the company and give a consolidated investment recommendation.
- *To present this analysis in the form of a stock pitch video.

Assignment and Instructions:

- First, **prepare a presentation containing your complete analysis of the company - qualitative fundamental analysis, quantitative fundamental analysis, valuation, overall expectations and investment recommendation.** Make liberal use of bullets, graphs and tables in your presentation. Avoid presenting your findings and conclusions in paragraphs.
- The first slide of your presentation should contain your name, your university, the date, and the name of the company you are analyzing. Keep your presentation concise and crisp; it should only contain important information. Your presentation should begin with your call, i.e. BUY/SELL/HOLD. Include the Standard disclaimer in the presentation.
- Next, **prepare a script of the explanation you are going to read out while recording the video.** Keep in mind that the script shouldn't be a repetition of what is being shown on screen.
- To make the pitch video, download a video/screen capture tool (like Snagit, Screencast-o-matic, etc.) from the internet.
- Once your presentation is prepared, record a video with the presentation as video and your voice as audio, detailing your findings and conclusions. Use the software that you have downloaded. Your video should not exceed 3 minutes in length.

- These are some sample stock pitch videos you can see to get an idea -<https://www.youtube.com/watch?v=SjOYcRZRyJw>; https://www.youtube.com/watch?v=PzD5gM7pn_E
- Please contact the query team at eri@mentored-research.com in case of any trouble with the assignment.