



**Wealthy Education**  
Learn More, Live Better!

# VALUE INVESTING

---

THE ADVANCED VALUE INVESTING COURSE

MODULE 3: THE FINAL THINGS

LEARNING MATERIAL – TAKEAWAY NOTE

# DISCLAIMER

---

LEGALLY REQUIRED DISCLAIMER – THIS COURSE CONTAINS THE PERSONAL IDEAS AND OPINIONS OF THE COURSE PROVIDERS. THE INFORMATION CONTAINED IN THIS COURSE IS FOR EDUCATIONAL PURPOSES ONLY. THERE IS NO RECOMMENDATION OR ADVICE ON MAKING ANY INVESTMENT DECISIONS, BUYING OR SELLING ANY TYPES OF STOCKS, SECURITIES OR INVESTMENTS DISCUSSED IN THIS COURSE. THE COURSE PROVIDERS ARE NEITHER STOCK BROKERS NOR REGISTERED INVESTMENT ADVISORS. WE DO NOT RECOMMEND MAKING ANY INVESTMENT DECISIONS PROPOSED IN THIS COURSE. INDIVIDUALS SHOULD FIND REGISTERED INVESTMENT ADVISORS TO HELP THEM MAKE INVESTMENT DECISIONS. ALTHOUGH THE COURSE PROVIDERS HAVE STRIVED FOR PROVIDING THE MOST ACCURATE INFORMATION, THERE IS NO GUARANTEE OR WARRANTY CONCERNING THE RELIABILITY, ACCURACY AND COMPLETENESS OF THE PROVIDED INFORMATION. INDIVIDUALS SHOULD BE CAUTIOUS ABOUT MAKING THEIR OWN INVESTMENT DECISIONS. INDIVIDUALS ARE SOLELY RESPONSIBLE FOR THEIR INVESTMENT DECISIONS. THE COURSE PROVIDERS ARE NOT RESPONSIBLE FOR ANY LIABILITIES AND LOSSES, WHICH MAY ARISE FROM THE USE AND APPLICATION OF THE INFORMATION AND STRATEGIES PROPOSED IN THIS COURSE.

# THANK YOU!

---

Hello friends,

Congratulations! You've completed the Module 3 – The Final Things. This is a learning note that we've prepared for you. It includes all key information in the lectures. You can take it away and revise the course from anywhere, on any device and at anytime you want.

If you have any concern about the lectures, feel free to send us a message, we are always here to help you!

Best regards,

Wealthy Education Team.

# DETERMINE YOUR INVESTMENT HORIZON

---

## ❖ Why should value investors be long-term investors?

- ☐ Value investing approach is for long-term investing
- ☐ Avoid being affected by your emotions – Greed & Fear
- ☐ Fully take advantage of the compound effect
- ☐ Pay less taxes and commissions

## ➔ Your investment horizon should be at least 1 year

# WHEN TO SELL YOUR STOCKS

---

## ❖ **Your company's fundamentals change**

- ❑ Significant drop in Sales, Net Income and Operating Cash Flow
- ❑ Losing competitive advantages
- ❑ Dividends are suddenly cut without any reasonable explanations

## ❖ **Selling signals**

- ❑ (i.e. SMA 60 crosses below SMA 180)

## ❖ **Stock price dramatically jumps** because of good news

## ❖ Need money for **investing in another better investment**

# HOW MANY STOCKS SHOULD YOU OWN?

---

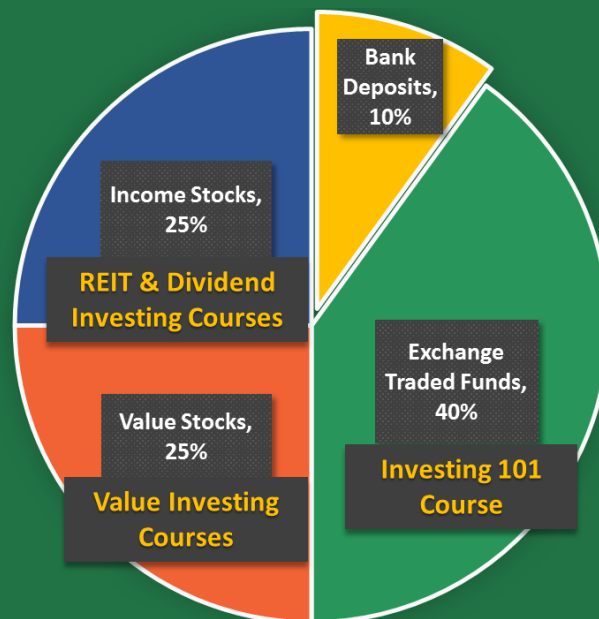
**Investments < 10**



- The number of investments depends on your investing skills and experience
- At a beginner level, you should not hold more than 10 different stocks
- If you are not experienced yet, don't try to use financial leverage (margin) because that's more risky

# WELL-DIVERSIFIED INVESTMENT PORTFOLIO

---



- Low-risk Investment Portfolio

- ☐ 10% Bank Deposit (for emergency)
- ☐ 40% Index Funds (ETFs)
- ☐ 25% Business Stocks (Value stocks, Blue-chip stocks)
- ☐ 25% Income Stocks (Dividend stocks, REITs)
- ➔ Diversify to Lower Your Risks



**Wealthy Education**  
Learn More, Live Better!

# THANK YOU!

---

FOR MORE INFORMATION:  
VISIT: [WWW.WEALTHYEDUCATION.COM](http://WWW.WEALTHYEDUCATION.COM)