

# *Investing in the Stock Market* ©

**Objective:** This intermediate level course focuses on how to analyze a corporation and its stock in-depth. It will explain how to gather the relevant information, how to analyze it, and what information should be ignored. The instructor will also explain the various factors that should be considered in structuring a stock portfolio.

## **Learning objectives:**

- Explain how to analyze a public corporation's financial statements
- Note other sources of information about a publicly traded corporation
- List the difference between a "good company" and a "good stock"
- Describe different techniques for evaluating a public corporation's stock
- List the key factors to consider in structuring a portfolio
- Note how to properly diversify a stock portfolio
- Set forth the factors to consider in selecting a money manager
- Explain how to evaluate a portfolio's performance
- Note the pitfalls to avoid

**CPE:** 4 hours

**Level:** Intermediate

**Category:** Technical Consulting

**Prerequisites:** "Investing Fundamentals for the Individual" is recommended but not required. This course compliments "Investment Ideas & Strategies."

**Instructor:** Dennis J. Gerschick

**Code:** ITSM