



INTRODUCTION TO ADVANCED RESEARCH – IIFL Markets Mobile App

Advanced Research

- ❖ It is a powerful equity research tool based on years of stock market expertise of investment legend William O'Neil.
- ❖ It is a decision-making tool that helps in uncovering promising ideas, to conducting efficient analysis.
- ❖ Its a One-stop, online destination to find and evaluate stocks.
- ❖ It extensively uses CAN SLIM methodology to identify stocks for the future.



CAN SLIM Methodology

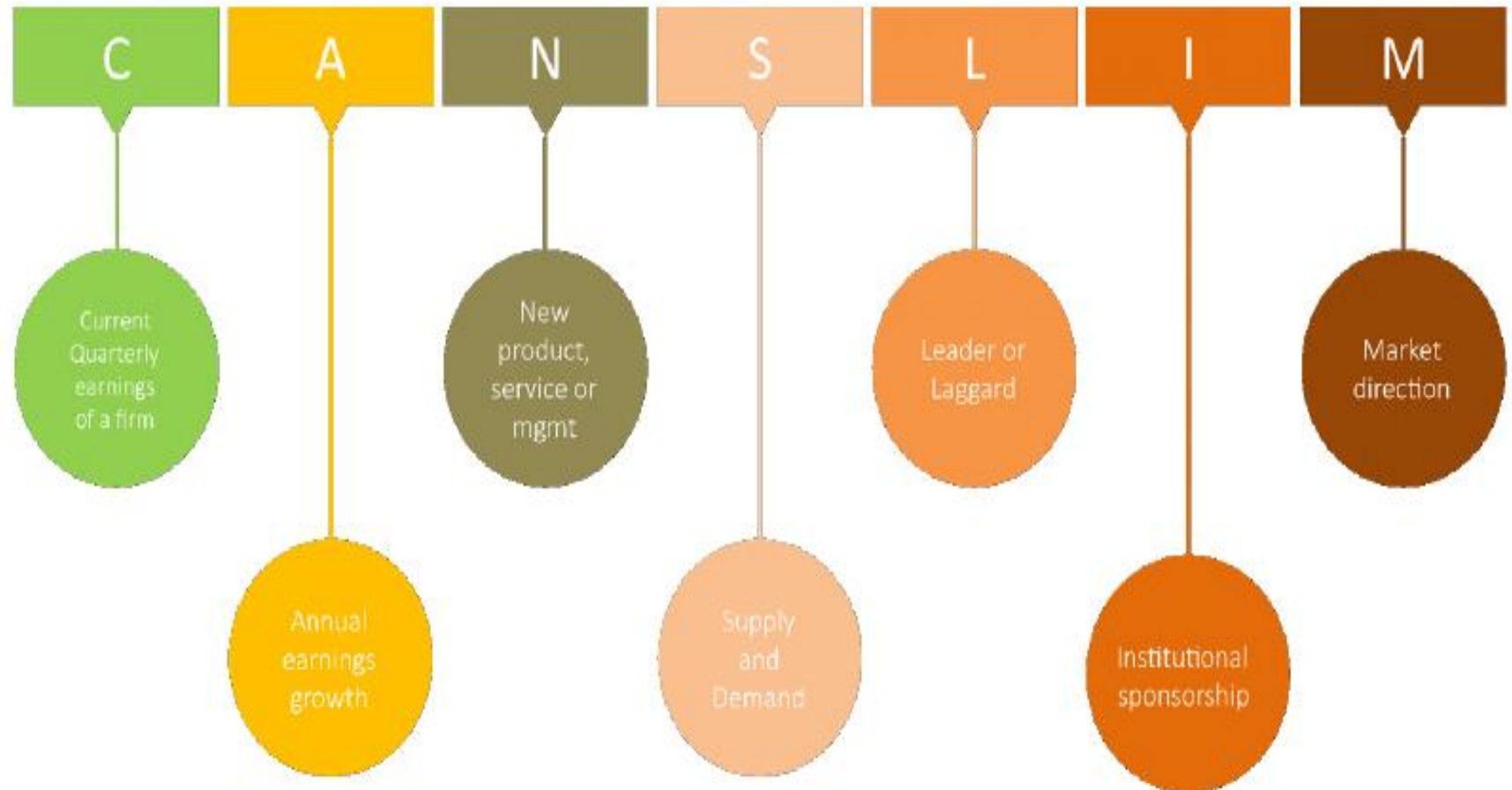
Legendary US investor & author William J. O'Neil did a comprehensive study of the greatest winning stocks spanning the past 125 years. He then put together a set of common characteristics to these past market leaders and coined the term CAN SLIM. Each letter stands for one of the seven chief characteristics of these greatest winning stocks

C A N S L I M



- ❖ No place for opinions, based on pure facts
- ❖ Includes "Post -Analysis" (Self -critique using charts)
- ❖ Rule-based system to overcome emotions such as Fear, Greed, Hope and Pride.

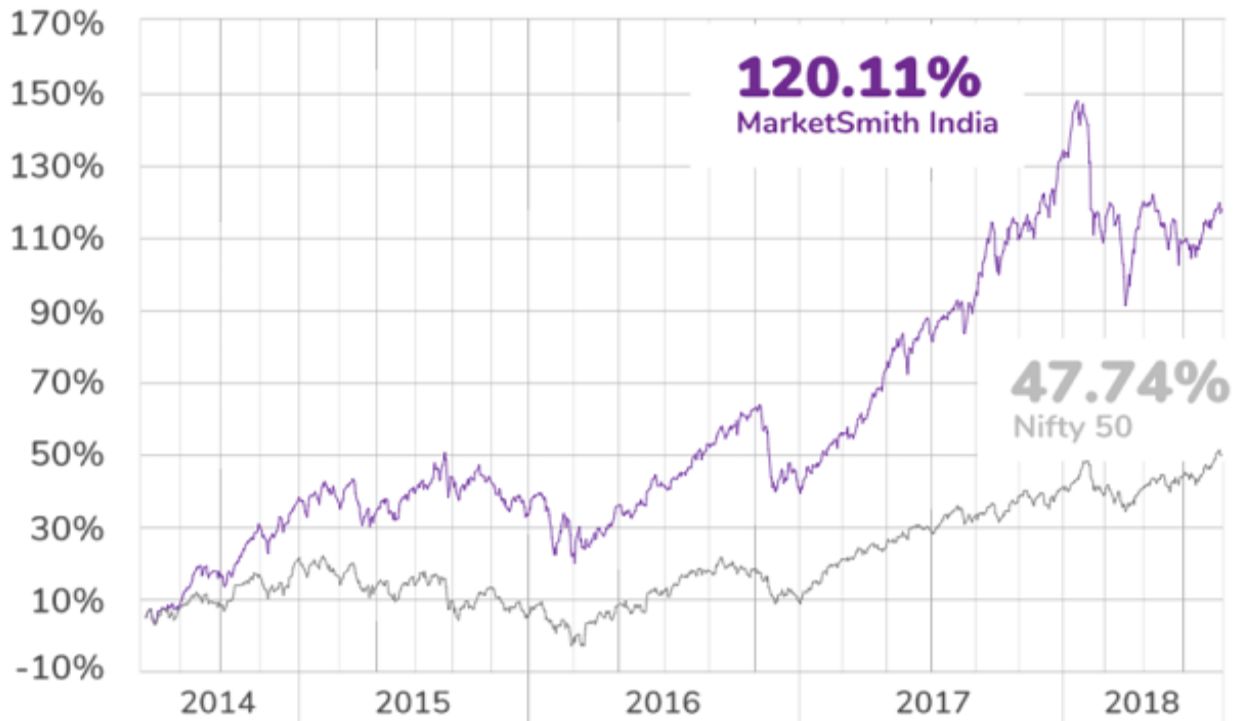
CAN SLIM- A Winning System



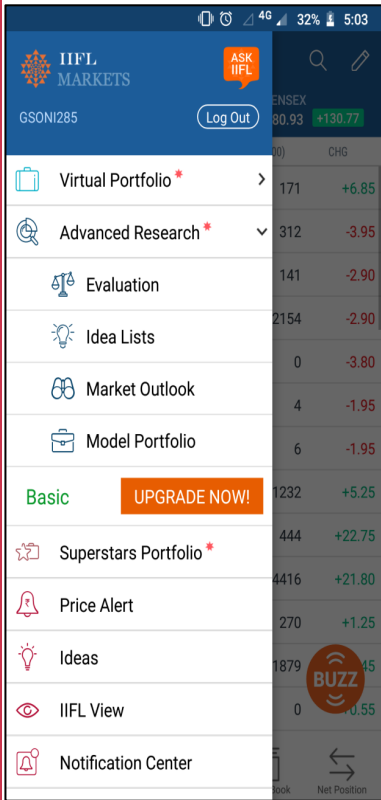
CAN SLIM – A Winning System

MarketSmith India Performance vs. Benchmark

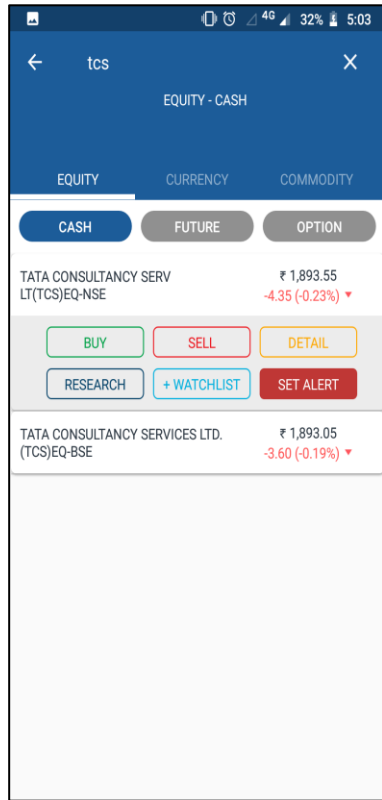
As of August 3, 2018



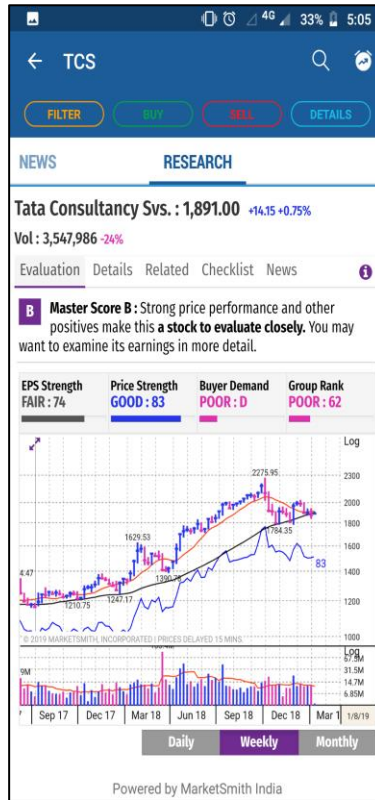
Advanced Research



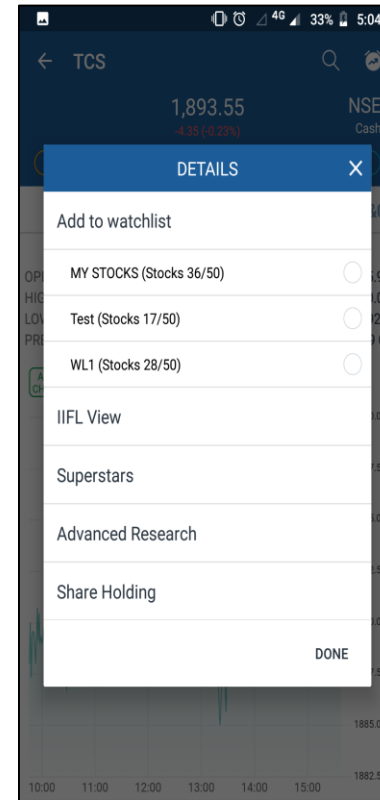
Hamburger Menu



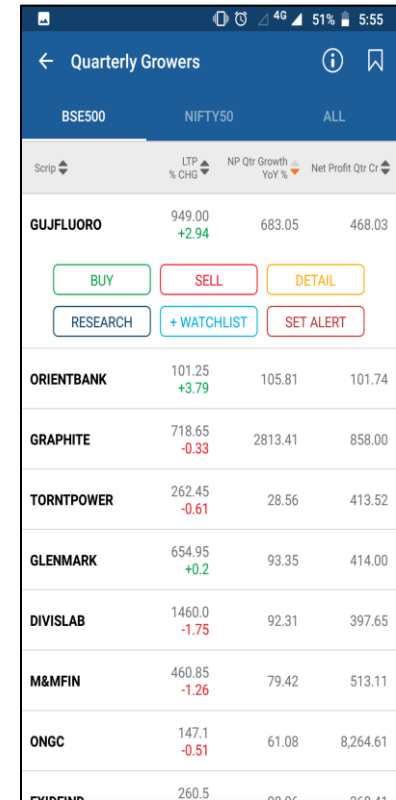
Search



Company Page



Company Page



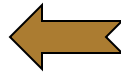
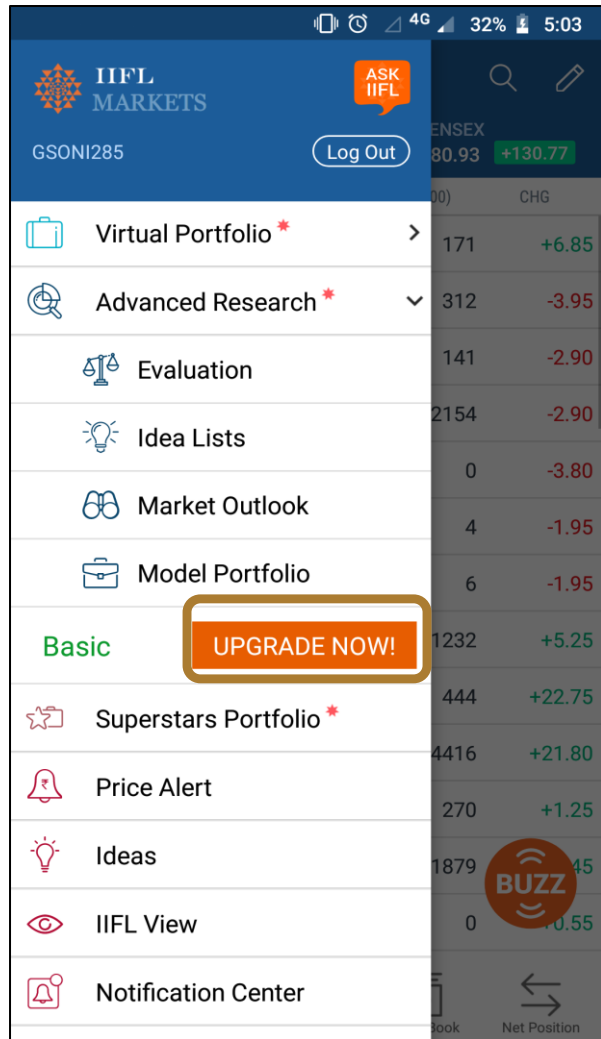
Screeners

Customer can view Advanced Research option in the Hamburger Menu page, Search, Company Details page, Screeners Section.

Note – Screeners version is in pipeline and will get released to 100% users by 11th Jan, 2018.

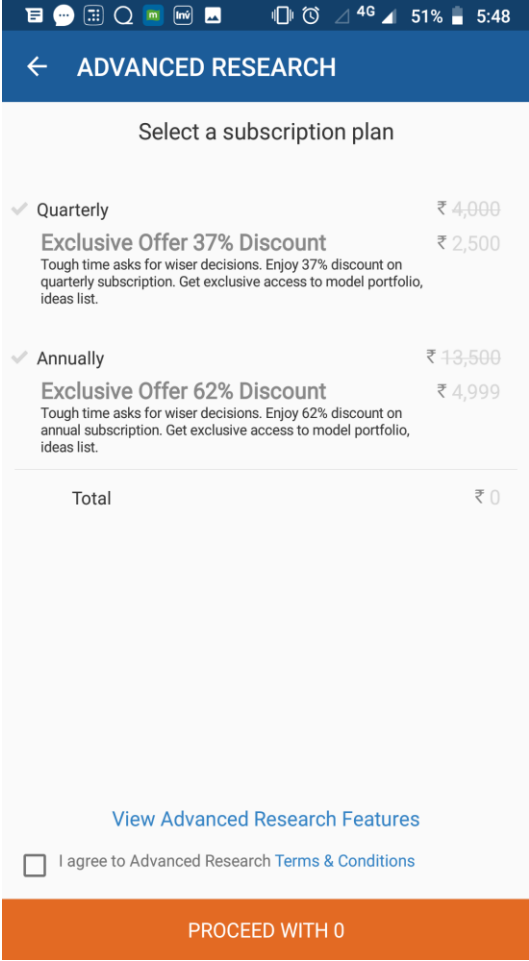
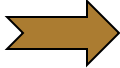
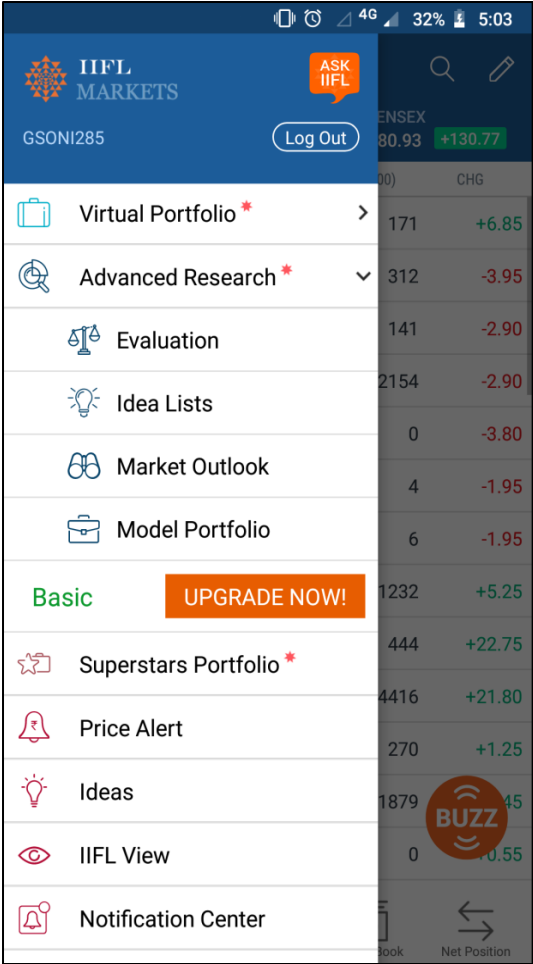


Advanced Research

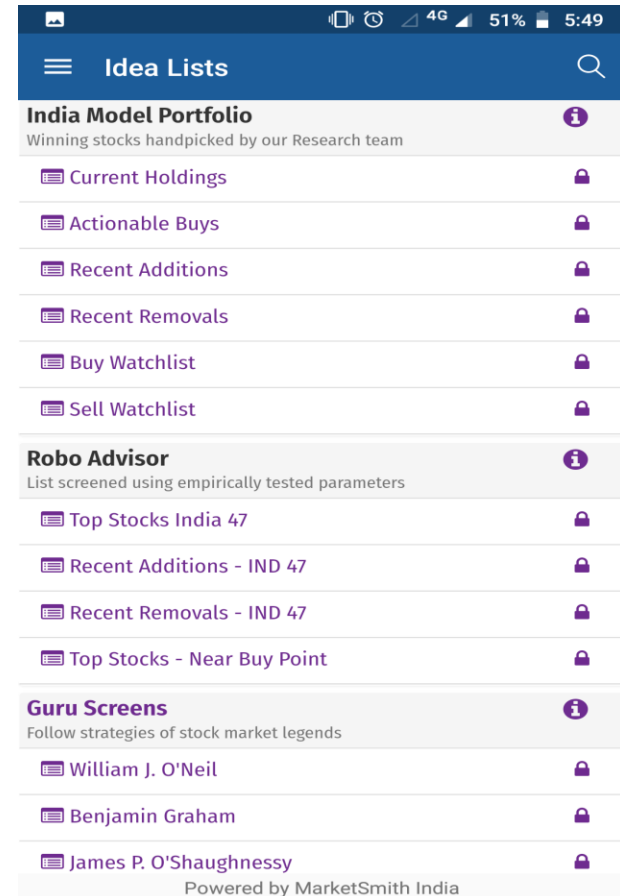
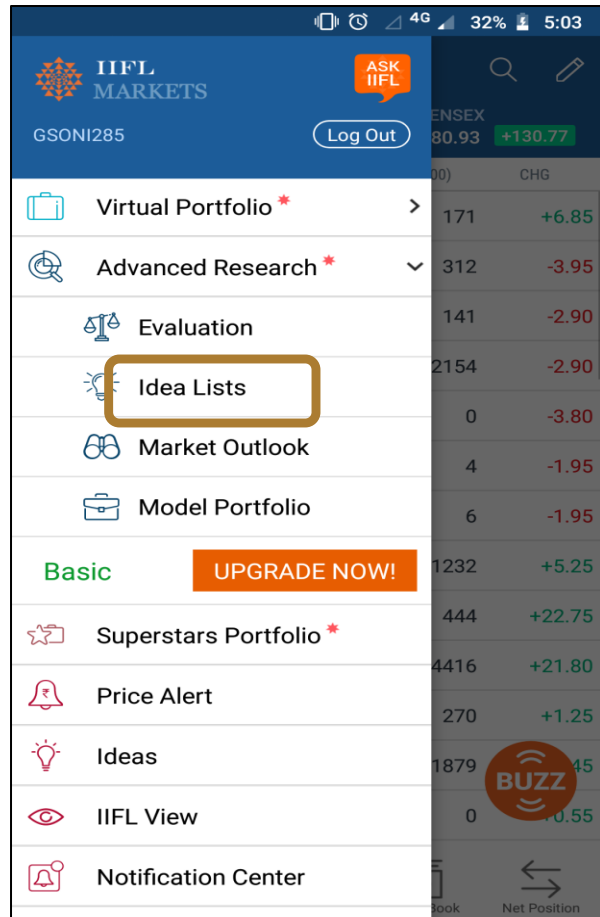


- ❖ After "Free Trial" is activated, our customers get 15 days free trial facility.
- ❖ On clicking **Upgrade Now** user would be taken to payment page.
- ❖ There would be Auto-Renewal after expiration of subscription. It can be cancelled upto 15 days, post which it cannot be cancelled.
- ❖ Post Cancellation, user would be taken back to "Basic" state

Advanced Research – Pricing Details



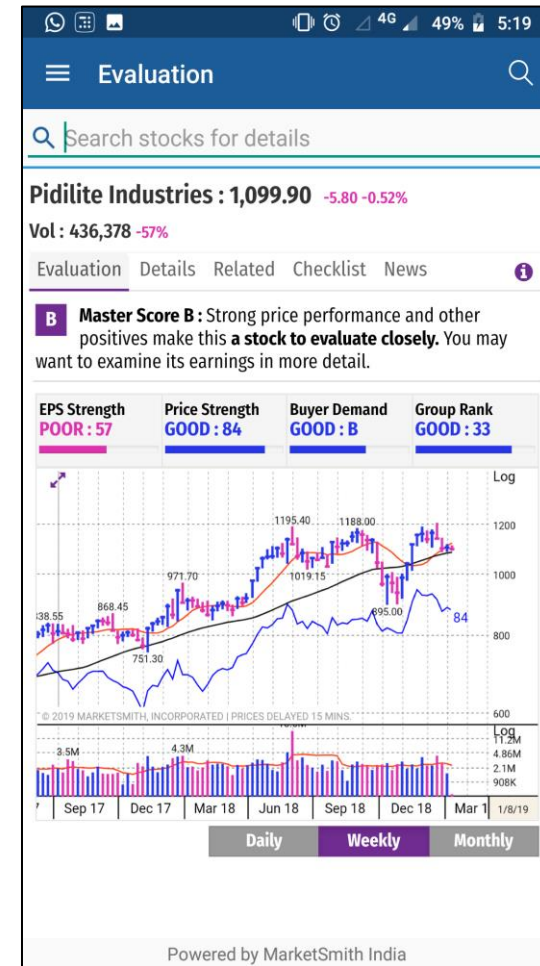
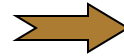
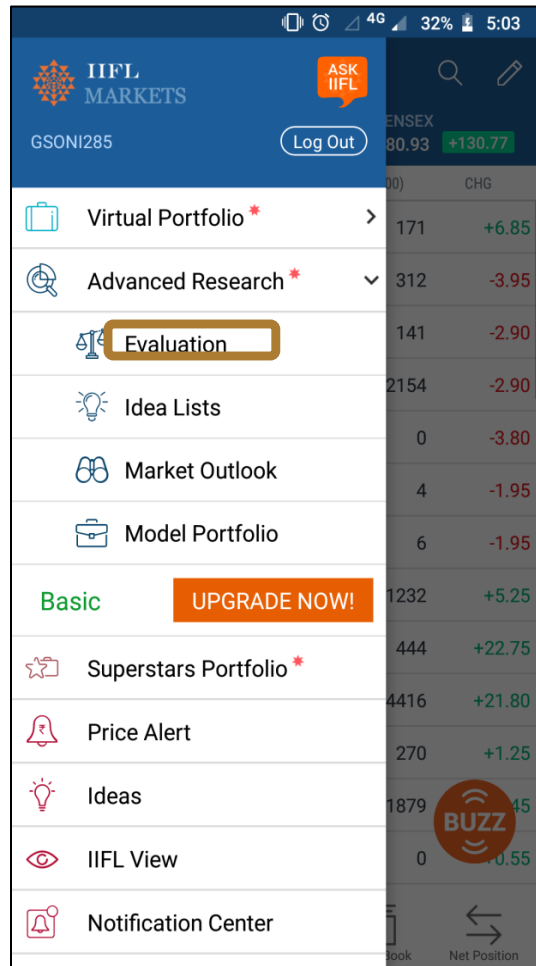
Advanced Research -Idea Lists



Idea list will show us various details as mentioned below:

- ❖ It has multiple lists having top performing stocks under different buckets.
- ❖ Handpicked India Model Portfolio (current Holding, Actionable Buys, Recent Additions, Removal, Buy watchlist, Sell Watchlist)
- ❖ Monitoring the stocks that you already own
- ❖ Up On Volume List
- ❖ Recently Viewed Stocks
- ❖ India 47 Premium Idea List (Recent Additions, Removals, Near Buy Point lists)

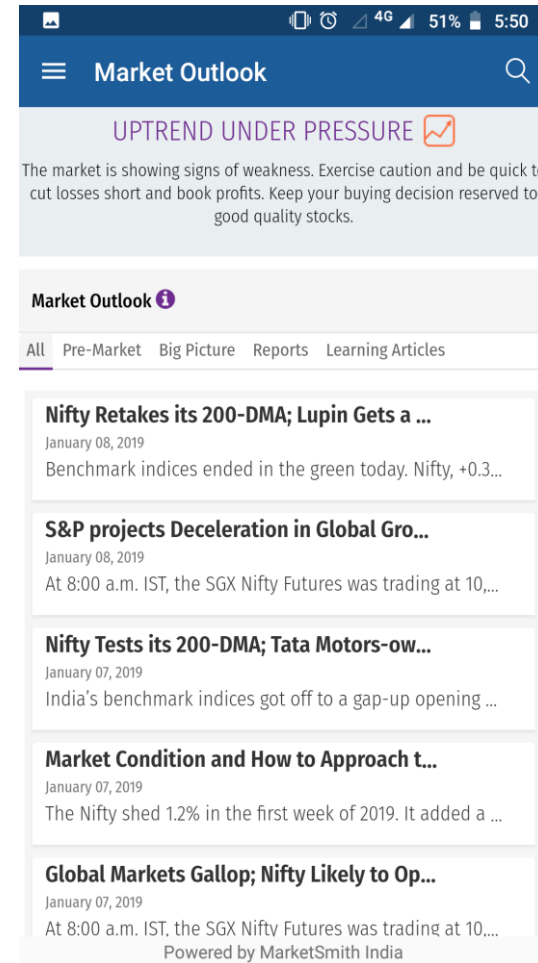
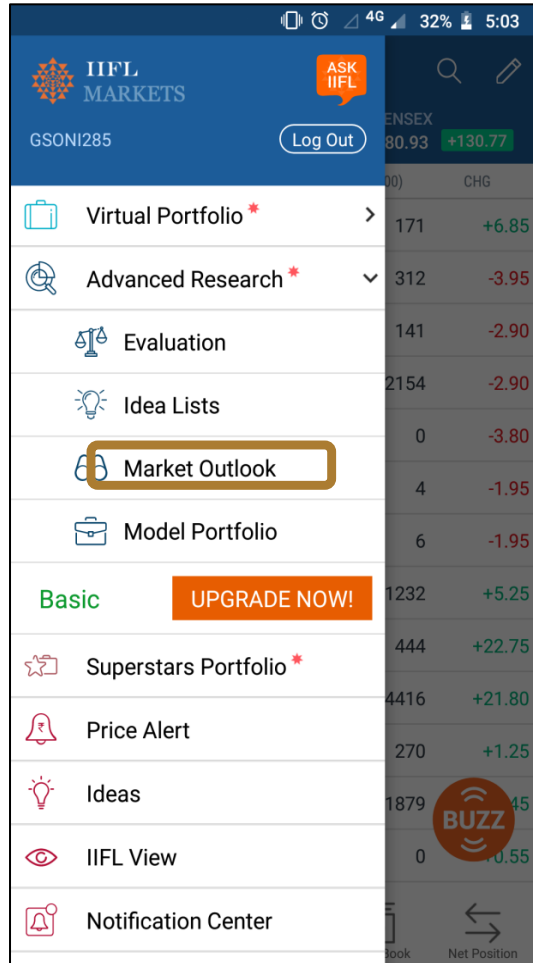
Advanced Research - Evaluation



After tapping on Evaluation option, Customer can view the stock information along with the stock ratings and key financial stats. The Evaluation view is composed of a stock chart and the stock-specific data in the Details tab.

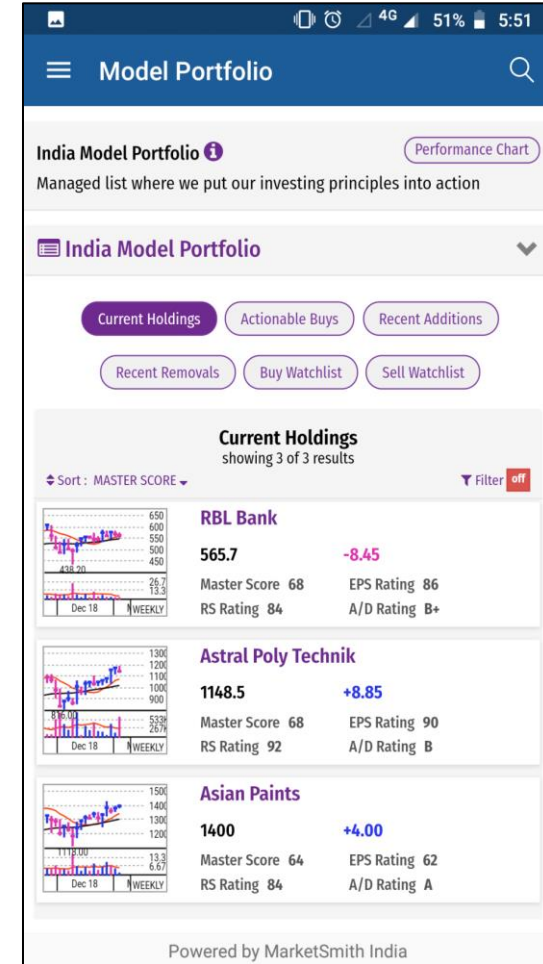
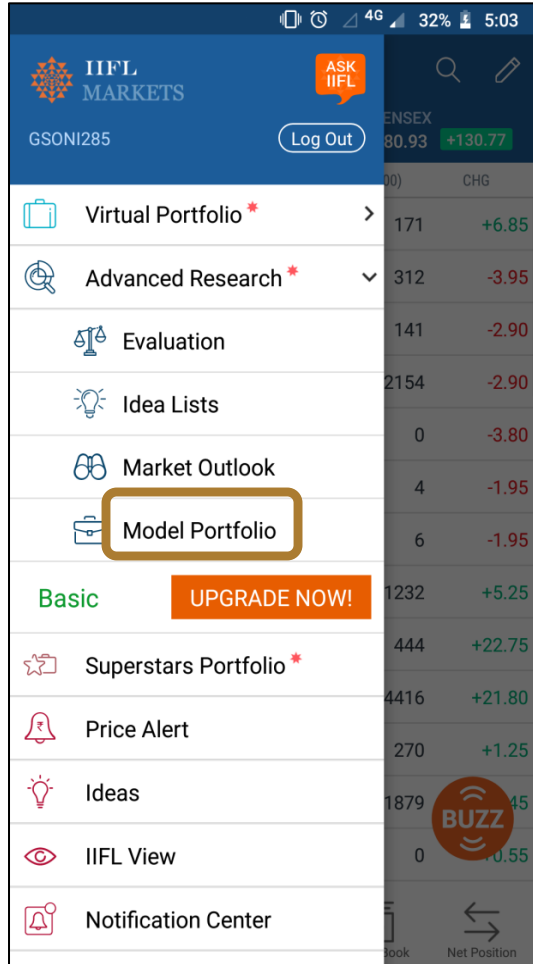


Advanced Research - Market Outlook



After tapping on Market Outlook, Customer can view daily & weekly report on overall Indian market conditions, performance evaluation of India 47 & model portfolio list, Sector reports, Special reports etc.

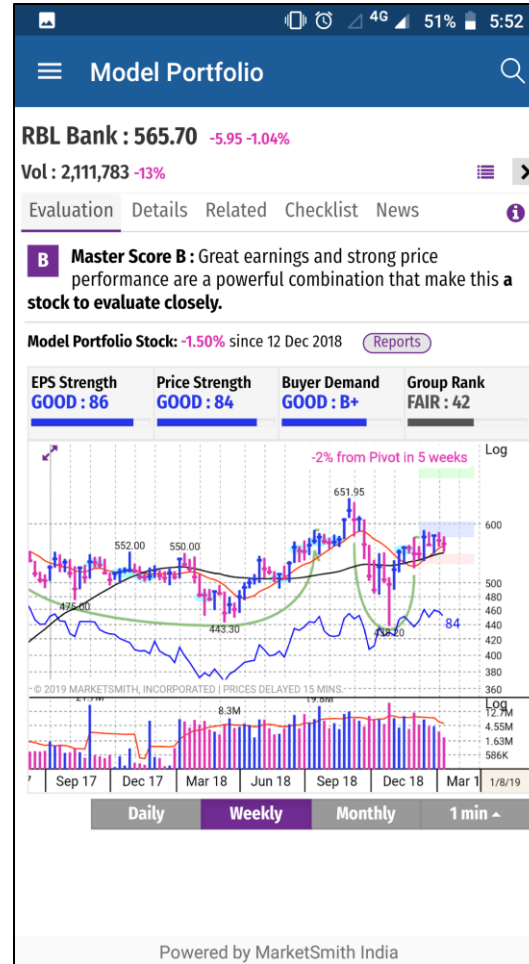
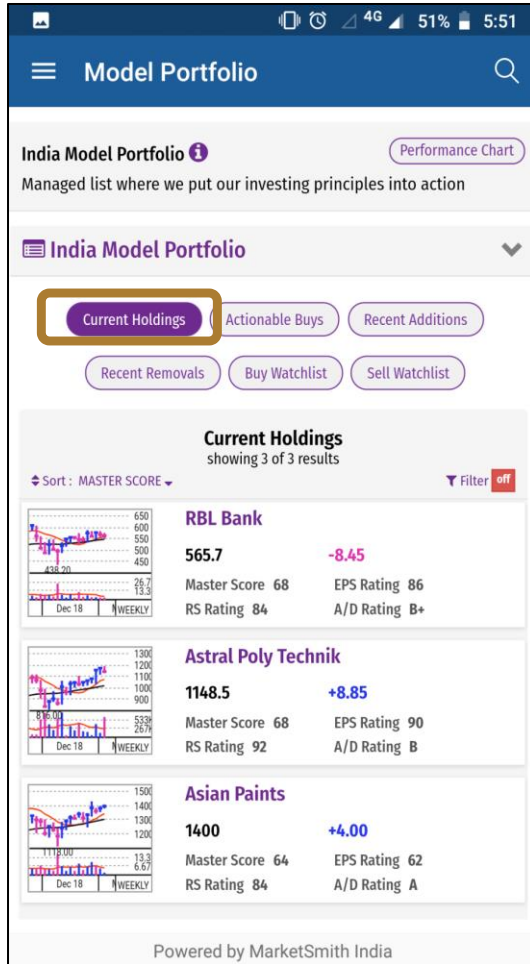
Advanced Research - Model Portfolio



- ❖ Once customer tap on Model Portfolio list then it will shows us various reports such as:
- ❖ List of Current Holdings
- ❖ Recent Additions & Removals of Stocks
- ❖ Buying stocks opportunity
- ❖ Weekly commentary on overall performance against the NSE



Model Portfolio -> Current Holdings



Current Holding

- ❖ It include all the stocks that are currently members of Model Portfolio
- ❖ List is updated when there is chnages in model Portfolio.
- ❖ It provide a list of stocks which are potentials for big gains.

Model Portfolio -> Actionable buys

India Model Portfolio Performance Chart

Managed list where we put our investing principles into action

India Model Portfolio

Current Holdings **Actionable Buys** Recent Additions

Recent Removals Buy Watchlist Sell Watchlist

Actionable Buys
showing 2 of 2 results

Sort: MASTER SCORE Filter off

Astral Poly Technik
1148.5 +8.85
Master Score 68 EPS Rating 90
RS Rating 92 A/D Rating B

Asian Paints
1400 +4.00
Master Score 64 EPS Rating 62
RS Rating 84 A/D Rating A

All Additions Removals Daily Reports Others

Model Portfolio Slips 0.2%
January 08, 2019
Today our model portfolio slipped 0.2%. The Nifty and t...
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Astral Poly Technik : 1,148.50 -30.40 -2.58%

Vol : 635,198 +325%

Evaluation Details Related Checklist News

B Master Score B : Great earnings and strong price performance are a powerful combination that make this a **stock to evaluate closely.**

Model Portfolio Stock: +2.70% since 27 Dec 2018 Reports

EPS Strength	Price Strength	Buyer Demand	Group Rank
GREAT : 90	GREAT : 92	GOOD : B	FAIR : 47

+3% from Pivot in 3 weeks

765.00 1194.80 712.00 816.00 92

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1.1M 455K 207K 93.9K

1 min

Daily Weekly Monthly 1 min

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Actionable buys

This section tells about the stocks that you currently need to buy in your portfolio.



Model Portfolio -> Recent Addition/ Removals

India Model Portfolio Performance Chart
Managed list where we put our investing principles into action

India Model Portfolio Performance Chart
Managed list where we put our investing principles into action

India Model Portfolio

Current Holdings Actionable Buys **Recent Additions** Recent Removals Buy Watchlist Sell Watchlist

Recent Additions showing 1 of 1 results

Sort: MASTER SCORE Filter off

Astral Poly Technik
1148.5 +8.85
Master Score 68 EPS Rating 90
RS Rating 92 A/D Rating B

Recent Removals showing 1 of 1 results

Sort: MASTER SCORE Filter off

Nestle India
10994 +207.90
Master Score 71 EPS Rating 91
RS Rating 89 A/D Rating B

All Additions Removals Daily Reports Others

Model Portfolio Slips 0.2%
January 08, 2019
Today, our model portfolio slipped 0.2%. The Nifty and t...

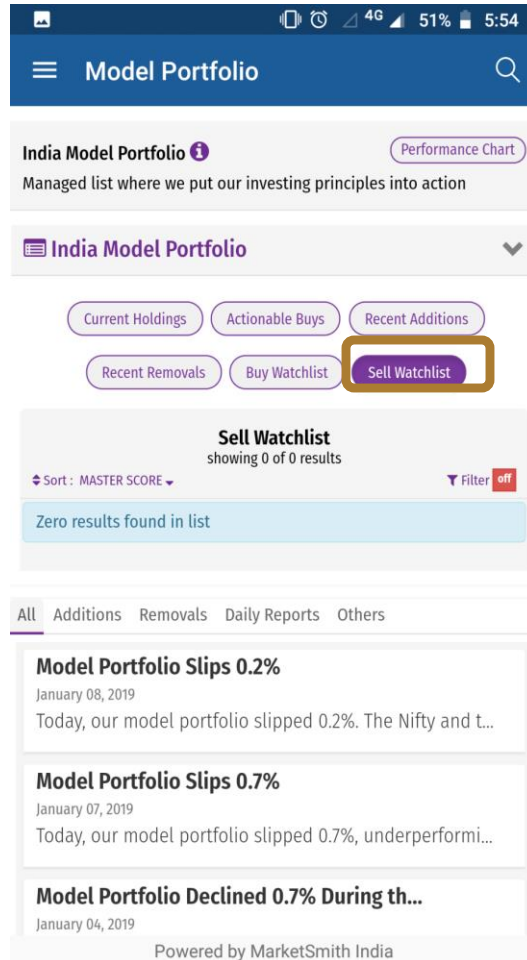
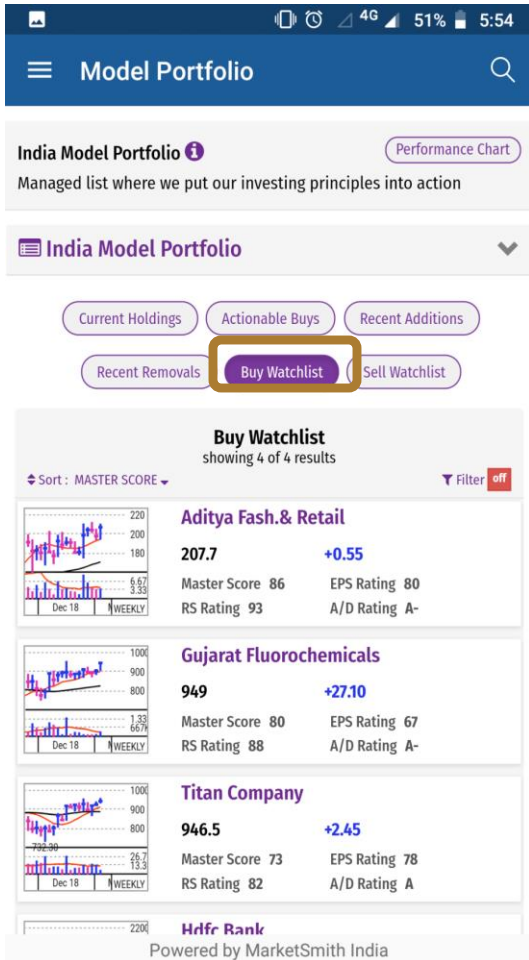
Model Portfolio Slips 0.7%
January 07, 2019
Today, our model portfolio slipped 0.7%, underperformi...

Powered by MarketSmith India

Recent Addition/ Removals

- ❖ This section provide information about recently added & removed stocks in model porftfolio
- ❖ Stocks are added in model porftfolio based on fundamental & technical strength, Using the CAN SLIM methodology
- ❖ Stocks are added & removed, based on volatility of the market.

Model Portfolio -> Buy/ Sell Watchlist



Buy Watchlist

- ❖ Keep tracks of stocks & identify potential stocks for the portfolio.

Sell Watchlist

- ❖ Identify list of stocks in model portfolio which are displaying signal of weakness that might consider for removal from portfolio

Abbreviation

EPS Rating- Earning per share Rating

RS Rating- Relative Strength Raing

A/D Rating- Accumulation/Distribution Rating



Thank You

