



TRENDUP

## L1 INTENSIVE COURSE Overview

**Objective:** To allow students to develop a strong base in investing in the financial markets, through discussion of the different philosophies and strategies of investing, with a focus on those that have been statistically proven to generate consistent results while minimizing risk. Upon successful completion, the students will be able to generate successful trades in both the traditional stock markets and the derivative option markets.

The L1 intensive also allows access to the worldwide community of TrendUp investors, which allows its members to cultivate relationships with other traders worldwide, amplifying both investing and professional opportunities. It is also the first step in the 3-level TrendUp program, which, upon completion, allows the student to obtain CBOE certification.

**Duration:** 10 teaching hours, distributed in 2 to 4 days.

These distributions can be adapted to the needs of the students if they are all from a particular university. Subject to availability.

**Instructor:** Alex Bastardas, M. Phil. A graduate from the University of Cambridge and the University of Pennsylvania, Alex has extensive experience in both the investing and the education world. He co-founded BBCP Capital in 2011, where he has been in charge of the fund's trading strategy, and has consistently delivered above-average returns throughout the fund's existence. Additionally, through his work in several educational institutions, Alex has developed and delivered investing courses, and has ample experience in teaching Finance in a variety of contexts worldwide.

**Language of Instruction:** English

## Syllabus Overview:

<b>Wealth Creation Through Investment</b>	An overview on the concept of investing is presented and the several investing vehicles available to individual investors are analyzed.
<b>Fundamental Analysis</b>	Fundamental analysis of stocks is discussed, the main financial statements and valuation ratios are considered, and strategies to apply fundamental analysis to generate trading profits are presented.
<b>Technical Analysis</b>	The main technical analysis topics are developed, with a focus on charting and momentum and strength indicators. Strategies in which one can apply these concepts to improve trade success are discussed.
<b>Event-Driven Analysis</b>	An overview on how internal and external events can generate investing opportunities is presented, with a focus on both internal activity (insider buying, for example) and external factors (from political instability or economic regulation to demographic or cultural changes).
<b>Volatility Analysis</b>	Using implied volatility analysis, we present how to approach investing decisions from the viewpoint of mathematical probabilities, by taking advantage of human overreactions and emotion in the market. While the concepts are mathematical/statistical, no advanced knowledge or particular ability in Mathematics is needed.
<b>The Derivative Market: Option Contracts</b>	The option contract, as the most attractive of the derivatives to retail investors, is analyzed.
<b>Option Pricing</b>	The factors which affect pricing of option contracts, and therefore guide any option trader's strategy, are discussed.
<b>Time, Volatility, Liquidity and Probabilities of Success</b>	An overview on how time to expiration, implied volatilities and liquidity affect your trade's probabilities of success, as well as its risk/return scenario.
<b>Option Strategies</b>	The main, most successful option strategies are presented, analyzed and developed in a straightforward way, so students can apply them successfully upon completion of the course.
<b>Trade Management</b>	A critical, and often overlooked aspect in investing education, is how to manage a trade, especially when the investment is not going your way.
<b>Strategy Review and Common Mistakes</b>	Using statistics from our fund's performance as well as financial backtested data, we present which strategies have the highest success rates, and we outline the common mistakes new traders make.