

# PRASHANT PAREEK

SEBI Registered Research Analyst

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## Package Details:-

### Package Code PSI 00A:- Focused Equity Conviction – Single Stock Insight

**Subscription Fee:-** ₹15,000 + 18% GST ( One Time )

#### Service Description

Focused Equity Conviction – Single Stock Insight is a one-time equity research service designed to identify and present one high-conviction listed Indian equity for a long-term investment horizon of 2 years or more.

The stock selection is based on in-depth fundamental research, including an evaluation of the company's business model, industry positioning, financial performance, growth sustainability, capital efficiency, balance sheet strength, cash flow quality, valuation rationale, and key risk factors.

This service is intended for investors who prefer a focused, disciplined, and conviction-driven investment approach, rather than holding a large number of stocks.

#### Scope of Coverage

- The research note includes:
- Business overview and competitive positioning
- Historical financial performance and growth trends
- Profitability and return ratios analysis
- Balance sheet and debt assessment
- Cash flow analysis
- Valuation perspective and investment rationale
- Key risks and monitoring factors
- Suggested investment horizon: 2–4 years

#### Service Delivery

- One-time written research note / recommendation
- Delivered digitally via email or document format
- This service does not include intraday calls, trading signals, continuous updates, or portfolio management

#### Important Disclosures

- This service does not provide any guarantee or assurance of returns
- Equity investments are subject to market risks
- Investors should consider their financial situation and risk tolerance before making investment decisions
- This is a research-based advisory service, not a discretionary or continuous advisory service

#### Investor Suitability

Investors are advised to participate in this service only if it is suitable to their financial situation, investment objectives, and risk tolerance.

## Package Code PSI 00B:- Short-Term Equity Research Signals

**Subscription Fee:** ₹10,000 + 18% GST per month / ₹27,000 +18% GST for three months.

### Service Description

Short-Term Equity Research Signals (15 trading Day Horizon) is a monthly / Three months subscription-based equity research service designed to provide research-backed stock ideas suitable for short-term investment holding periods of up to 15 trading days.

The service focuses on identifying listed Indian equities with favorable short-term price momentum, volume confirmation, and fundamental support, while maintaining defined risk parameters. Each stock idea is shared with a clearly stated expected holding period, along with rationale based on technical and quantitative indicators.

This service is intended for investors who seek short-duration opportunities while following a disciplined, rule-based approach.

### What the Client Receives (Monthly)

- 08 to 10 short-term stock ideas per month
- Suggested holding period: up to 15 trading days
- Entry range and risk level explanation
- Clear exit logic (time-based or price-based)
- Written research rationale for every idea  
(No intraday trading. No leverage-based strategies.)

### What Is NOT Included

- No guaranteed or assured returns
- No intraday or options trading recommendations
- No portfolio management
- No continuous real-time alerts

### Risk & Disclosure Statement

- Equity investments are subject to market risks
- Short-term investments may experience higher volatility
- Returns are not assured
- Clients are advised to invest as per their risk profile and capital suitability

### Investor Suitability

Investors are advised to participate in this service only if it is suitable to their financial situation, investment objectives, and risk tolerance.

## Package Code PSI 00C:- Mid-Term Equity Research Select

**Subscription Fee:-** ₹25,000 + 18% GST ( One Time )

### Service Description

Mid-Term Equity Research Select (6-Month Horizon) is a one-time equity research service designed for investors who wish to invest in selected Indian listed companies with a medium-term investment horizon of up to 6 months.

The service focuses on identifying companies with improving business fundamentals, earnings visibility, sectoral tailwinds, and favorable price trends, making them suitable for medium-term capital appreciation.

This service is ideal for investors who seek opportunities beyond short-term volatility but do not wish to commit capital for multiple years. The number of research ideas may vary based on market conditions and suitability.

### Scope of Coverage

- Business and sector overview
- Recent financial performance and earnings trends
- Growth triggers and medium-term catalysts
- Balance sheet and cash flow assessment
- Valuation comfort and relative comparison
- Key risk factors and downside considerations
- Suggested holding period: Up to 6 months

### Service Delivery

- Up to 2 mid-term stock ideas
- One-time written research note
- Digital delivery (email / document)

### Important Disclosures

- This service does not provide any guarantee or assurance of returns
- Equity investments are subject to market risks
- This is a research-based advisory service, not portfolio management or discretionary advisory

### Investor Suitability

Investors are advised to participate in this service only if it is suitable to their financial situation, investment objectives, and risk tolerance.

## Package Code PSI 00D:- Long-Term Equity Conviction Portfolio

**Subscription Fee:-** ₹35,000 + 18% GST ( One Time )

### Service Description

Long-Term Equity Conviction Portfolio (1–2 Year Horizon) is a one-time equity research service designed for investors seeking to build high-quality equity positions with a long-term investment horizon of up to 2 years.

The service focuses on identifying companies with strong business models, sustainable competitive advantages, consistent financial performance, sound capital allocation, and long-term growth visibility.

This service is intended for investors who prefer patience-driven investing and long-term wealth creation, rather than frequent portfolio churn. *The number of research ideas may vary based on market conditions and suitability.*

### Scope of Coverage

- Business and sector overview
- Recent financial performance and earnings trends
- Growth triggers and medium-term catalysts
- Balance sheet and cash flow assessment
- Valuation comfort and relative comparison
- Key risk factors and downside considerations
- Suggested holding period: Up to 2 years

### Service Delivery

- Up to 3 long-term stock ideas
- One-time written research note
- Digital delivery (email / document)

### Important Disclosures

- This service does not provide any guarantee or assurance of returns
- Equity investments are subject to market risks
- This is a research-based advisory service, not portfolio management or discretionary advisory

### Investor Suitability

Investors are advised to participate in this service only if it is suitable to their financial situation, investment objectives, and risk tolerance.

## Package Code PSI 00E:- Ultimate Equity Conviction Bundle

**Subscription Fee:-** ₹65,000 + 18% GST ( One Time )

### Service Description

Ultimate Equity Conviction Bundle is a one-time comprehensive equity research package designed for investors seeking multi-horizon exposure across mid-term and long-term investment opportunities.

This bundle is created by **combining Package A (Focused Equity Conviction – Single Stock Insight), Package C (Mid-Term Equity Research), and Package D (Long-Term Equity Conviction Portfolio)** into a single, structured offering.

The package integrates a high-conviction long-term stock idea, medium-term positional opportunities, and a diversified long-term conviction portfolio, enabling investors to allocate capital strategically across different time frames while maintaining a disciplined, research-driven investment approach.

The number of research ideas may vary based on market conditions and suitability.

### Service Delivery

- Up to 6 equity research ideas across multiple horizons
- One-time detailed research reports
- Digital delivery (email / document)
- No intraday trading or portfolio management included

### Important Disclosures

- Returns are not guaranteed
- Equity investments are subject to market risks
- This is a research-based advisory service, not discretionary or continuous advisory

### Investor Suitability

Investors are advised to participate in this service only if it is suitable to their financial situation, investment objectives, and risk tolerance.

## Package Code PSI 00F:- Single Stock Review & Action Insight

(Buy / Hold / Sell – Research-Based View)

**Subscription Fee:-** ₹1,000 + 18% GST ( One Time )

### Service Description

Single Stock Review & Action Insight is a one-time equity research service designed for investors who seek a research-based opinion on a specific listed Indian equity that they already hold or are considering.

Under this service, the Research Analyst provides a Buy / Hold / Sell view based on a structured analysis of the company's fundamentals, financial performance, valuation comfort, business outlook, and key risk factors, aligned with the investor's stated investment horizon.

This service is intended to help investors make more informed and disciplined decisions, rather than acting on market noise or unverified information.

### Scope of Coverage

- The research note includes:
- Brief business overview
- Review of recent financial performance
- Valuation comfort / stress assessment
- Key positives and concerns
- Risk factors and monitoring points
- Research-based view: Buy / Hold / Sell
- Suggested investment horizon context (short / medium / long term)

### Service Delivery

- Coverage of one (1) listed Indian equity only
- One-time written research note / response
- Digital delivery via email or document
- Client must specify the stock name at the time of request

### What Is NOT Included

- No guaranteed or assured returns
- No intraday, derivatives, or leverage-based advice
- No portfolio restructuring or continuous monitoring
- No price targets or stop-loss levels (unless explicitly stated as analytical levels)

### Important Disclosures

- Equity investments are subject to market risks
- This service provides a research-based opinion, not a binding instruction
- This is not portfolio management, discretionary advisory, or continuous advisory service

### Investor Suitability

Investors are advised to participate in this service only if it is suitable to their financial situation, investment objectives, and risk tolerance.

## Package Code PSI 00G:- Portfolio Health Check & Rebalancing Review

**Subscription Fee:-** ₹12,000 + 18% GST ( One Time )

### **What the Client Receives:**

- Comprehensive review of the client's **existing equity portfolio (up to 15 listed stocks)**
- Identification of **overweight positions and underperforming holdings**
- **Hold / Reduce / Exit** framework based on risk and suitability
- Portfolio **risk concentration and diversification analysis**
- Alignment check with investment horizon and objectives

*Clients may submit any equity portfolio containing up to 15 stocks for review.*

### **Investor Suitability**

Investors who are already invested but feel uncertain or confused about their current holdings.

## Package Code PSI 00H:- Model Equity Portfolio

**Subscription Fee:-** ₹50,000 + 18% GST ( One Time )

### **What the Client Receives:**

- Sample long-term equity portfolio (illustrative)
- Asset allocation and diversification logic
- Risk explanation and monitoring framework
- Educational commentary for investor understanding

The term "Model Portfolio" is used strictly for educational and research purposes. This service does not constitute portfolio management or execution.

### **Investor Suitability**

Investors who want to understand **how a disciplined long-term portfolio is constructed**, rather than seeking managed services.