

TRADING & INVESTING STRATEGIES



Online Course
by
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Evidence-Based Investing

Studies show 90% of all traders lose money. While individual investors may do better, few outperform professionally managed funds. But even most of these funds fail to outperform their index!

[CNBC: Most day traders lose money \(worldwide\)](#)

[IFA: Active Fund Managers vs. Indexes - Analyzing SPIVA Scorecards](#)

A large number of investors and traders know markets well. They have read books, watched videos and learnt strategies. Such material offers insights and inspiration, but **implementing it isn't always easy in actual market conditions**. Some of the key challenges are:

- Many strategies are difficult to apply because they don't prepare you for the chaos and unpredictability of real-world investing.
- Too much room for interpretation, as vague advice leaves you unsure of how to make it work in reality.
- No feedback loop for improvement when you don't know whether mistakes, misunderstandings, or bad luck caused poor results.
- Strategies often rely on assertions and anecdotes instead of rigorous testing, making them unproven in practice.

This course has been designed to fill these gaps. Instead of simply teaching popular strategies, we first identified **what actually works in markets using scholarly research findings**. Since the exact steps that produced their results are known, there is no ambiguity. Some strategies are well-known; others remain overlooked.

You'll also get a **complete toolkit including Google Sheets with live market data integration** that continues to work long after the course.

Proceed at your own pace - fast or slow - with personal guidance from Deepak Mohoni throughout. **Start immediately after registration!**

Learning Outcomes

- Develop realistic expectations about trading and investing outcomes using the most trustworthy source - scholarly research.
- Learn how to **allocate** across index funds, managed investments (like MFs), and stock-picking. Decide whether trading suits your goals. **Plan for retirement** or *FIRE*.
- Explore clips and writings directly from legendary investors, Nobel laureates, and other visionaries - not distortions of their ideas.
- Learn why skilled fund managers struggle to beat the index, while individual investors have an edge because of fewer constraints.
- Harness the power of **Google Sheets** to analyze historical and live market data, with ready-to-use templates that you can use forever.
- You can learn related topics not included in the course by simply asking! You can also request **extra material** on covered subjects.
- Learn which **Technical Analysis** methods work and which don't. Master risk and money management for robust trades.
- Learn **Options** from scratch. Use the **Black-Scholes** model to evaluate trades. Understand the hidden danger of high **tail risk** associated with selling options. Spot opportunistic options trades.
- Understand powerful ideas from academic research: how the **Efficient Market Hypothesis** explains why it is so hard to beat the market, while **Anomalies** identify strategies that do. Often-mentioned concepts like **Quant Strategies** and **Factor Investing** (including **Smart Beta**) make considerable use of anomalies. You'll not only learn how these two approaches work, but also decode other street jargon in the course.

Understanding Markets

EFFICIENT MARKET HYPOTHESIS

The Efficient Market Hypothesis (EMH) is the most important concept in investing, despite being a model that can't be proven. It has driven decades of research and fundamentally shaped our understanding of financial markets.

EMH, formalised by Nobel laureate Eugene Fama, is often mocked in books and talks for implying that markets cannot be beaten, making many products and strategies seem pointless. Yet, even top investors and most active funds struggle to outperform the market consistently, reinforcing the EMH.

Understanding EMH is vital for developing realistic expectations in investing. It will remain central to our approach when we examine any strategy.

ANOMALIES

One of the fascinating consequences of the Efficient Market Hypothesis has been the discovery of market anomalies. As academics sought to test (and often disprove) the EMH, they uncovered consistent patterns that seem to contradict market efficiency. These anomalies present individual investors with potential opportunities to outperform the market.

Interestingly, many institutions struggle to capitalize on these anomalies due to their size, regulatory constraints, and the paradox that widespread exploitation of an anomaly can cause it to disappear. This creates a unique opportunity for individual investors.

The course covers several well-documented anomalies that are quite easy for investors to understand and potentially implement, unlike the complex strategies of investing legends. Some of the anomalies we will explore include **Price Momentum, Post-Earnings Announcement Drift, Long-Term Reversal Effect, Size Effect** and **IPO Underpricing** to name a few.

Understanding Markets

LEARN DIRECTLY FROM THE GIANTS OF FINANCE

This section brings together a curated collection of video clips and writings from some of the greatest minds in finance and investing - including Nobel Laureates like **Daniel Kahneman** and **Robert Shiller**, renowned investors such as **Peter Lynch** and **Warren Buffett**, and brilliant thinkers like **Nassim Taleb**, **Aswath Damodaran**, **Malcolm Gladwell**, **Benoit Mandelbrot**, and others.

Through these selections, you'll hear the actual words of the most influential figures in investment finance. Listening to them will help you develop a more discerning view of financial advice and investment strategies. And as you understand their approaches, even if not easily replicable, you will gain deeper market insights and critical thinking skills to evaluate financial claims and advice.



Investing Toolkit

BEHAVIOURAL FINANCE

- Cognitive Biases in Investing.
- Herd Behavior and Market Bubbles.
- Prospect Theory and Risk Perception.
- Critiques of behavioral approaches.

WEB RESOURCES

- Learn how to use essentially free web resources for stock analysis.
- Access real-time stock prices and market data, as well as advanced charting and technical analysis tools.
- Get up-to-date fundamental data and analyse company financials. Discover sources for scholarly studies and expert insights.
- Note that two other major resources - Google Finance and AI chatbots - are described in detail elsewhere in this document.

USING AI FOR SMARTER INVESTING

Learn how to incorporate AI tools and chatbots into your research. We will start with an introduction on using AI chatbots from scratch, then cover advanced AI prompts for powerful insights and inputs.

If you're not confident with AI, you can just skim this section - no other part of the course depends on it. Many investors prefer doing hands-on research themselves rather than using AI. Both approaches can be effective in investing.

Investing Toolkit

GOOGLE SHEETS: YOUR PERMANENT TOOLKIT

Google Sheets, with its **GOOGLEFINANCE** function, is arguably the most powerful free resource for traders and investors on the internet. It can load real-time and historical data into a spreadsheet, including price and fundamental information for stocks, indices, mutual funds, commodities, currencies, cryptocurrencies, and other assets. This capability enables users to create spreadsheets that automatically update, perform complex calculations, and visualize financial data in real-time.

This course not only uses these features but also helps you master Google Sheets. Participants receive pre-built sheets that perform a wide range of functions - simply change the ticker, and the rest happens automatically.

A partial list of the sheets you'll receive is provided below. These sheets alone are worth the course fees!

Importantly, **these sheets remain with you after the course ends, and will continue to work.** You can also copy and modify them to suit your own purposes, allowing for further customization and learning.

GOOGLE SHEETS INCLUDED IN THE COURSE

(Partial List)

Momentum. Rank stocks and create momentum portfolios for Indian and US markets.

Drawdown Calculator. Calculate the size and duration of declines from peak values.

Volatility. Compute the annualised volatility for any time frame.

Sharpe Ratio. A widely used performance measurement metric.

Risk & Money Management. Compute position size for a trade.

Day-trading Lookup (Nifty 500, S&P 500). Useful dashboard for day-trading.

Moving Average Calculator. Find the best-performing moving average over any backtest period. Also for two-moving average crossover strategies.

Options. Get option price predictions using the Black-Scholes model.

Compare Two Entities. Compare performance and other metrics for any two tickers.

Beta Calculator. Calculate beta, correlation coefficient, and alpha for any asset.

Investing Strategies

PASSIVE INVESTING

Even top-performing funds struggle to consistently beat the market, so aiming for market returns is often a smarter, lower-risk strategy. With passive investing, you invest in low-cost, index-tracking ETFs, avoiding the high fees and complexity of active management. Even if you enjoy picking stocks or trading actively, it makes sense to park a significant part of your portfolio in passive investments, benefiting from the market's overall growth over time.

The course will guide you on how to choose the best ETFs for passive investing and how to use Systematic Investment Plans (SIPs) to build your portfolio gradually and consistently.

MOMENTUM INVESTING

Momentum investing is one of the most reliable strategies, consistently delivering results across various markets and timeframes. While many investors are familiar with the term "momentum stocks," few know how to identify them effectively. This course builds on one of the best-known market anomalies—momentum—and teaches you practical steps to implement it. You'll learn how to identify momentum stocks, adjust your portfolio, and replace underperformers to fine-tune the strategy for optimal performance.

And, of course, there is a momentum template in your Google Sheets toolkit, allowing you to build and monitor your own momentum portfolios indefinitely. This tool lets you simulate how hypothetical portfolios would have performed between any two dates in the past, providing valuable insights into your strategies. This hands-on approach deepens your understanding of how momentum works in practice and equips you with everything you need to create a winning strategy.

Investing Strategies

OTHER INVESTING STRATEGIES

Investing strategies like Passive Investing and making use of market anomalies (including Momentum Investing) are relatively straightforward for individual investors to learn and implement. However, there are several better-known strategies - often famous due to a handful of superstar investors. Despite their popularity they tend to be more complex, subjective, and requiring deeper information compared to the ones discussed earlier. Not everyone has enjoyed consistent success with them, as their outcomes often depend on teams of researchers working on them, and large computing resources. Still, they are worth studying as they provide good ideas and are useful as additional material for investment decision-making, and are therefore included in this course.

The well-known strategies explained in the course include **Value Investing**, **Factor Investing** (including **Smart Beta**), **Growth Investing**, **Dividend Investing**, **Quality Investing**, **Contrarian Investing**, and a few others. Even though these are subjective in nature, we will examine what research based on both actual performance and simulations - say about their effectiveness.

We will also cover a few strategies which are actively used in the financial world, but are beyond the reach of individual investors due to the need for advanced technology, substantial capital, and organizational resources. These include **High-Frequency Trading**, **Statistical Arbitrage**, **Event-Driven Trading**, **Market Making**, **Activist Investing**, **Private Equity**, **Venture Capital** and a few others. Understanding these offers an insight into institutional investing and broader financial markets.

The course also takes a quick look at emerging strategies that are increasingly becoming accessible to individual investors, such as **Thematic Investing**, **Alternative Data Investing**, **Machine Learning & AI-driven Strategies**, **Peer-to-Peer Lending**, and **Risk Parity**.

Trading Strategies

INTRODUCTION TO TRADING STRATEGIES

It is well established that 90% of traders lose money worldwide. Yet trading is encouraged by businesses that profit from it. Many traders quit within their first month, while profitable traders seem to survive against the odds. This suggests that emotions, impulsive decisions, and get-rich-quick hopes drive many trading decisions, contributing to the high failure rate.

The lack of funds or indices dedicated to short-term trading strategies means there's no publicly verifiable track record for these approaches. This has led to many claims of trading success, which are difficult to verify and are often false, especially when linked to products or services. Also, trading is subjective and intuitive, making it challenging to distinguish between skill and luck when evaluating performance.

Most traders use technical analysis, which involves charts and indicators. While some scholarly studies have found certain charts and indicators to be profitable, getting similar results in practice can be challenging. High costs from frequent trading, and discrepancies between theoretical and actual execution prices will cut profits. Furthermore, strategies that worked well in past markets may fail in future conditions.

However, there is no reason to limit short-term trading to technical analysis. Several market anomalies with brief durations can be exploited, such as IPO underpricing and Post-Earnings Announcement Drift (PEAD). Additionally, momentum investing can be adapted for shorter timeframes. These approaches offer more robust and lesser-used strategies.

Nevertheless, the course covers technical analysis and options trading in depth. Risk and money management takes precedence, supported by rational analysis, and approaches that avoid widespread misconceptions.

Trading Strategies

TECHNICAL ANALYSIS

- A no-nonsense evaluation of technical indicators and chart patterns. What does the evidence say? Which ones work?
- Day-trading and swing-trading techniques.
- The real core of trading: Risk and money management.
- Mastering stop losses and trailing stops.
- Breakouts: How to spot and act on them.
- System design and the correct way to backtest strategies.
- Performance measurement of trading systems.
- Using technical analysis to identify superior entry and exit points as an add-on to other (non-technical analysis) strategies.
- Powerful Google Sheets for traders.

OPTIONS TRADING

- Master the essentials of options, with zero prior knowledge required. Learn the specifics of the Indian and US markets.
- Learn what the widely used Black-Scholes model and the Greeks (like Delta, Gamma, and Theta) are, and how they're applied in pricing and managing options risk. Receive a Google Sheet to perform these calculations anytime.
- Analyze another Google Sheet that compares options from the start of the month to their expiry, revealing how many expire worthless along with other key statistics.
- Learn about tail risk and fat tails, and why they make selling options dangerous - despite the apparent success of others.
- When to buy options? Exploit anomalies, adopt tail-risk positioning, act on perceived mispricing (post-research), hedge portfolios, bet on market surprises.

Participant Feedback

- Very thought provoking. The way these strategies have reshaped how I trade and invest, it feels like having total control over my portfolio, no matter what the market does. 😊 Following them is ridiculously simple!
- A big shift for me - I once dismissed efficient markets as academic nonsense. Now, I see how others waste their time chasing unpredictable returns, while I have finally understood how the market really works.
- Why didn't anyone tell me about tail risk before? I've been selling options for years without realizing how much danger I was exposing myself to! This course not only showed me how to trade smarter but also how to protect myself better
- The personal guidance from Deepakji is truly one of a kind! Whether it was a basic query or a complex one, I always got thoughtful answers. That kind of support is not seen anywhere - highly recommend!
- Since they said I can ask for something not in the course, I requested a computer program to download prices for any stock from the net. I was given full instructions, and now I can do it myself!
- The short videos with Kahneman and Peter Lynch and so many other masters were wonderful. I have played them many times already. All the Google Sheets work beautifully and help a lot.
- Got family affairs in order finally, and retirement plan is working.
- My finance professor is impressed with my knowledge now!
- Good. Certainly got the new tricks of trading risk and money management.

Instructor



Deepak Mohoni

This online course is uniquely crafted by Deepak Mohoni, a well-known figure in Indian financial markets, who coined the term *Sensex* in 1989 in his column with *Business World*.

An alumnus of IIT Kanpur and IIM Calcutta, Deepak combines decades of financial expertise with an active role in software development. Recently, he introduced the *Quant Dashboard*, and more innovative tools to support data-driven investing are in development.

Deepak also wrote a widely followed weekly column in *The Economic Times*, appeared daily on leading business channels such as *CNBC TV18* and *ET Now*, and was often quoted for his market insights by newspapers, including international publications such as the *Financial Times* and *Asahi Shimbun*.

His contributions to media, including expert sound bites and interviews, established him as a trusted voice in Indian financial markets.

He has conducted over 150 workshops for investors, including in-house sessions for companies such as ICICI Securities, DSP Merrill, Kotak Securities, and Motilal Oswal, along with educational institutions such as IIT Kanpur, IIM Ahmedabad, Symbiosis, and NIBM. Over 3,000 investors have gained valuable insights from his workshops and lectures.

Throughout the course, you will have one-on-one access to Deepak, who will personally answer all your questions.

Who will benefit?

- **Beginners.** The course is perfect for beginners as they do not have to unlearn anything. The material is explained in a way which requires no prior knowledge.
- **Seasoned Investors.** Even if you've been investing for years, this course will challenge assumptions, refine strategies, and introduce evidence-based methods to drastically improve results.
- **Traders.** Learn to trade systematically, replacing impulsive decisions with a structured approach, and master how much to risk on each trade for best results.
- **Retirement and FIRE Planners.** For those nearing retirement or pursuing financial independence, this course helps you build a balanced, low-risk portfolio for steady growth. Secure your future with evidence-based strategies tailored to your goals.
- **DIY Investors.** Prefer managing your own portfolio instead of relying on advisors? Learn techniques and tools that make do-it-yourself investing smarter and more efficient
- **Coders.** Ask for free guidance on coding resources, packages, and system implementation. Convert strategies into trading systems!
- **Busy Professionals** can create an investing plan that minimizes effort while delivering returns consistent with their goals.
- **Families.** This course is perfect for families managing wealth together or couples planning for shared financial goals. Build a strategy that works for everyone.
- **Teachers and Educators.** If you run market-related courses, this course shows how your methods compare against rigorous scholarly testing, helping you enhance lessons and give your students a robust edge.

Program Structure

The course is self-paced, meaning you can view the material whenever it suits you—there are no scheduled sessions or deadlines. This flexibility allows you to proceed at your own speed, taking breaks whenever needed or moving faster than the default timeline. All posts and materials are sent directly via email, making it easy to keep up even with a busy schedule.

Typically, it takes a little over 12 weeks at around 20-30 minutes a day, but you can finish it in less than half the time or go much slower if you have other commitments.

Throughout the course, Deepak will be available to personally answer any questions you have, ensuring you get the most out of every section and concept. You can also ask for extra material on topics that interest you more.

Live exercises using actual stock data (paper trading only!) and quizzes are integrated to reinforce learning and provide hands-on experience with the strategies discussed. Additional lessons on mathematics, statistics, or other relevant topics are also available on demand.

How to register

Course Fees (including GST): ₹28,000

Special rates are available for groups of two or more, senior citizens, and students/fresh graduates. Please reach out for more details.

Payment Options: You can easily pay via UPI to: dmohoni@okicici
Or simply scan the QR code below.

For other payment methods, please write to us.

Contact for Registration and Queries:

Email: course@trendwatchindia.com

WhatsApp: +91 97633 26592

The course starts immediately upon signing up.

REGISTER NOW!

