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COURSE BROCHURE

Fundamental and Chart-Based Market Analysis Training Course

13 – 17 September 2027
New York

Fundamental and Chart-Based Market Analysis Training Course

Ref: 2672_101872 **Date:** 13 – 17 September 2027 **Location:** New York **Fees:** 7900 GBP

Fundamental and Chart-Based Market Analysis is a 1-week training course for investment analysts, treasury dealers and portfolio staff who must join valuation evidence with price behaviour, and each participant leaves with a trade entry and exit plan. Markets now reprice on earnings news within minutes, so desks that read both the balance sheet and the chart make steadier calls. Jupiter Prime Training delivers this course on fundamental and chart-based market analysis.

Why Fundamental and Chart-Based Market Analysis Matters Now

Electronic order flow compresses the gap between an earnings release and the price response, while investment committees and risk officers ask analysts to show why a position is held and when it will be cut. A desk that blends intrinsic value with trend, momentum and volume evidence sizes positions with clearer exits; one relying on a single lens holds losers too long or drops sound ideas early. The course rests on discounted cash flow valuation, relative multiples and classical chart reading.

Who Gains Most from Fundamental and Chart-Based Market Analysis

- Equity and credit analysts who turn company accounts into a fair value range and a buy or sell view
- Treasury dealers who time currency, money market and bond transactions around price levels
- Portfolio staff who set position sizes, rebalancing triggers and stop levels
- Investment risk officers who test whether trade rationales and exit rules hold together

An investment desk gains most when its analysts and dealers attend together, because both groups then share one vocabulary for valuation signals and price signals.

Fundamental and Chart-Based Market Analysis Capabilities

Participants read a security from two directions, the business and the market's behaviour, then reconcile both into one decision.

- Calculate a fair value range from earnings, cash flow and peer multiples — the investment committee's hold or sell decision
- Identify trend direction, support and resistance from price charts — the dealer's timing of entries
- Apply moving averages and momentum oscillators to confirm or reject a valuation view — portfolio managers weighing conviction
- Interpret volume behaviour around breakouts and earnings releases — the risk officer's view of signal reliability
- Set stop-loss, target and position-size rules from volatility measures — the desk head controlling drawdown
- Build a trade entry and exit plan that joins valuation and chart evidence — the committee approving a position

Key Fundamental and Chart-Based Market Analysis Terms

- Intrinsic value — the estimated worth of a security from its expected future cash flows, discounted at a required rate of return.
- Support and resistance — price zones where buying or selling pressure has repeatedly halted a decline or an advance.
- Moving average — the average closing price over a set number of sessions, used to smooth noise and show trend direction.
- Relative strength index — a momentum oscillator from 0 to 100 comparing recent gains with recent losses to flag overbought or oversold conditions.
- Volume confirmation — a rise in traded volume that accompanies a price move and suggests broad participation behind it.
- Average true range — a volatility measure of the typical daily price span, used to place stops and size positions.

Fundamental and Chart-Based Market Analysis Day by Day

Day 1: Market Context and the Two Analytical Lenses

- Efficient Market Debate — Where Fundamental and Price Evidence Each Add Value
- Top-Down Economic Cycle Mapping — Sector Rotation and Asset Allocation Choices
- Price, Time and Volume Data Sources — Choosing Reliable Inputs for Analysis
- Chart Types: Line, Bar and Candlestick — Reading Market Sentiment Quickly
- Analyst and Dealer Roles on a Desk — Who Owns Which Signal

Day 2: Fundamental Valuation of a Listed Company

- Earnings Quality and Cash Conversion Review — Trusting the Reported Profit Figure
- Discounted Cash Flow Valuation — Setting a Fair Value Range
- Peer Multiples: Price to Earnings and Enterprise Value to Earnings — Relative Cheapness Calls
- Dividend Yield and Payout Sustainability — Income Investors' Holding Decisions
- Catalyst Calendar of Results and Corporate Events — Timing Re-Rating Opportunities

Day 3: Reading Price Behaviour on the Chart

- Trend Lines and Channels — Confirming Direction Before Committing Capital
- Support and Resistance Zones — Locating Entry and Profit-Taking Levels
- Reversal and Continuation Patterns — Judging Whether a Move Will Persist
- Simple and Exponential Moving Average Crossovers — Trend Change Alerts
- Gaps Around Earnings Releases — Distinguishing Breakaway From Exhaustion Moves

Day 4: Momentum, Volume and Risk Rules

- Relative Strength Index and Divergence — Spotting Fading Momentum Against Valuation
- Moving Average Convergence Divergence Signals — Confirming Timing of Entries
- On-Balance Volume and Breakout Volume Tests — Assessing Signal Reliability
- Average True Range Stop Placement — Limiting Loss on Each Position
- Position Sizing by Risk Per Trade — Protecting the Portfolio From Drawdown

Day 5: Practising the Trade Entry and Exit Plan

- Combined Screening of Value and Trend Candidates — Building the Watch List
- Valuation and Chart Scorecard for One Security — Reconciling Conflicting Signals
- Scenario Testing of Earnings Surprise and Breakdown — Preparing Contingent Exits
- Trade Journal and Post-Trade Review Template — Learning From Each Position
- Completing the Trade Entry and Exit Plan — Committee Presentation and Sign-Off

Applying Fundamental and Chart-Based Market Analysis After the Course

- Run a fortnightly desk session pairing an analyst's fair value range with a dealer's chart levels for one security, then agree a scorecard rating.
- Introduce a trade journal recording valuation signal, chart signal, stop level and outcome for each new position, reviewed monthly.

Fundamental and Chart-Based Market Analysis Questions FAQ

What is fundamental and chart-based market analysis and why does it matter now?

It is the joint use of company valuation and price chart evidence to decide what to buy and when. Prices now react to news faster, so a sound valuation still needs timed entries and clear exits.

Who gains most from fundamental and chart-based market analysis skills?

Investment analysts, treasury dealers and portfolio staff gain most: analysts add timing discipline, dealers gain a firmer reason for each trade, and portfolio staff gain consistent stop and sizing rules.

How does a fundamental and chart-based market analysis course differ from a financial statements course?

It goes beyond reading accounts. A financial statements course stops at company health; this course carries that view into charts, momentum and volume, ending with a trading decision rather than a report.

What do you bring back from fundamental and chart-based market analysis training?

You bring back a trade entry and exit plan for a real security, a reusable valuation and chart scorecard, and a journal template that makes each position reviewable.

Fundamental and Chart-Based Market Analysis: The Way Forward

The trade entry and exit plan first informs whether a candidate security earns a place in the portfolio and at what size. Analysts, dealers and the investment committee use it together. After its first use, revisit how often valuation and chart signals disagreed and whether stops protected capital or cut sound positions early.