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COURSE BROCHURE

Stock Selection Styles and Sell Discipline Training Course

3 – 7 May 2027
Geneva

Stock Selection Styles and Sell Discipline Training Course

Ref: 2768_105874 **Date:** 3 – 7 May 2027 **Location:** Geneva **Fees:** 6500 GBP

Stock Selection Styles and Sell Discipline is a 1-week training course for investment analysts, private investors and wealth advisers; participants write a personal stock investing strategy with explicit selection and sell rules. Rotating market leadership leaves an undisciplined stock picker exposed. Jupiter Prime Training runs this stock selection styles and sell discipline course.

Why Stock Selection Styles and Sell Discipline Matter Now

Three forces shape stock selection today. Leadership rotates between cheap, fast-growing and dividend shares, so a proven style can lag for long stretches. Screening tools are now in every hand, rewarding written rules over impulse. Clients ask why a holding was bought and when it will be sold. Clear criteria keep conviction through drawdowns; without them investors hold losers too long and sell winners too soon. The course rests on established equity valuation methods, factor investing research and behavioural finance findings on investor bias.

Who Gains Most from Stock Selection Styles and Sell Discipline

- Analysts who screen listed companies and recommend which shares enter a buy list
- Private investors who run their own share accounts and set their own entry and exit points
- Wealth advisers who explain stock ideas to clients and justify each sale
- Research associates who maintain watch lists and valuation sheets

An advisory desk or research group gains most when its analysts and client-facing advisers attend together.

Stock Selection Styles and Sell Discipline Capabilities

Participants move from choosing a style that suits their temperament to writing the screens, triggers and limits that turn that style into repeatable decisions.

- Compare value, growth, dividend income, quality and momentum styles by return pattern and drawdown behaviour — style choice
- Build a stock screen with valuation, profitability and balance sheet filters — buy list entry
- Test dividend sustainability through payout ratios and free cash flow cover — income investor approval
- Specify entry rules that combine a valuation margin with a price confirmation — purchase timing
- Design sell rules for thesis breaks, valuation targets and trailing stops — exit decision
- Set position risk limits per holding and per sector — client suitability review

Key Stock Selection Styles and Sell Discipline Terms

- Value investing — buying shares priced below an estimate of intrinsic worth based on earnings, assets or cash flow.
- Growth investing — favouring companies whose sales and earnings expand faster than the market, often at higher valuations.
- Quality factor — a preference for firms with high return on equity, stable margins and low debt.
- Momentum — the tendency of shares with strong recent price performance to keep outperforming for a period.
- Investment thesis — a short written reason for owning a stock, with the evidence that would prove it wrong.
- Trailing stop — a sell level that rises with the share price and triggers an exit after a set fall.

Stock Selection Styles and Sell Discipline Day by Day

Day 1: Style Landscape and Investor Temperament

- Equity Style Families And Their Return Cycles — Choosing A Core Approach
- Investor Time Horizon And Drawdown Tolerance — Matching Style To Temperament
- Behavioural Bias Checklist — Spotting Anchoring, Overconfidence And Loss Aversion
- Style Rotation Case Reviews — Judging When A Style Lags
- Investment Thesis Template — Recording Why Each Share Is Owned

Day 2: Value and Dividend Income Selection

- Price To Earnings And Price To Book Screens — Finding Undervalued Shares
- Earnings Yield Versus Bond Yield Comparison — Setting A Valuation Margin
- Value Trap Warning Signs — Separating Cheap Shares From Declining Businesses
- Payout Ratio And Free Cash Flow Cover — Testing Dividend Sustainability
- Dividend Growth History Filters — Building An Income Watch List

Day 3: Growth, Quality and Momentum Selection

- Revenue And Earnings Growth Screens — Identifying Expanding Companies
- Price To Earnings Growth Ratio — Judging Whether Growth Is Fairly Priced
- Return On Equity And Margin Stability Filters — Ranking Business Quality
- Relative Strength Ranking — Selecting Shares With Persistent Price Leadership
- Multi-Style Scoring Sheet — Combining Value, Quality And Momentum Signals

Day 4: Entry Rules, Sell Rules and Position Risk

- Staged Buying And Price Confirmation Rules — Timing Each Purchase
- Thesis Break Triggers — Deciding When Evidence Forces An Exit
- Valuation Targets And Trailing Stops — Locking In Gains On Winners
- Position Loss Limits Per Holding — Capping Damage From Single Shares
- Sector And Style Concentration Caps — Avoiding Hidden Overlap Between Holdings

Day 5: Practising the Personal Stock Investing Strategy

- Style Choice Statement — Applying Temperament Findings From The First Day
- Screen Settings For The Chosen Style — Combining Earlier Selection Filters
- Buy And Sell Rule Sheet — Linking Entry Triggers To Exit Triggers
- Back Review On Past Holdings — Testing Rules Against Real Decisions
- Personal Stock Investing Strategy — Completing Selection, Sell Rules And Risk Limits

Applying Stock Selection Styles and Sell Discipline After the Course

- Run the chosen stock screen and write an investment thesis for the top three results.
- Review every current holding against the new thesis break triggers and sell rules.

Stock Selection Styles and Sell Discipline Questions FAQ

What are stock selection styles and sell discipline, and why do they matter now?

They are the approaches investors use to choose shares and the written rules that decide when to sell them. They matter now because fast style rotation and abundant screening data punish decisions made on impulse.

Which roles gain most from stock selection styles and sell discipline training?

Investment analysts, private investors and wealth advisers gain most. Research associates also benefit.

How does stock selection styles and sell discipline training differ from a portfolio construction course?

It focuses on single shares rather than the whole portfolio. A portfolio construction course sets weights and active risk across many holdings; this subject covers how each share is chosen, bought and sold.

What do you bring back from stock selection styles and sell discipline training?

You bring back a written strategy for choosing and exiting shares. It states your style, screen settings, entry triggers, sell rules and loss limits per holding and per sector.

Stock Selection Styles and Sell Discipline: The Way Forward

The personal stock investing strategy informs the first decision after the course: which shares on the current watch list deserve capital and which existing holdings should go. Analysts, investors and advisers use it to explain each trade. After a full market cycle, revisit the chosen style and its sell triggers, because temperament and market leadership both change.