



Invest like a Business Owner

My Equity Sherpa empowers you with research about evolving opportunities in NSE & BSE listed stocks to invest with clarity.

About Us

My Equity Sherpa is the **brand name** under which its founder provides qualitative stock research service (spotting, analyzing, and recommending) for BSE and NSE-listed stocks.

- **Philosophy:** A 'Buy and Hold' (Positional Trade) approach focused on market-cap agnostic ideas.
- **Brand Promise:** Your Success Defines Ours.

- **Founder & Managing Owner:** Surender Singh
- **Registered Name of the Research Analyst:** Surender Singh
(Proprietor: **My Equity Sherpa**)

- **SEBI Registration #:** INH000026035
- **BSE Enlistment #:** 7069
- **Qualifications:** PGDIFM, Passed CFA Level I & II, B.E(Mech)

Our Ethos: What We Do, Choose, and Think

Vision

Be the partner of choice
by championing our
clients' success.



Mission

Regularly find evolving
investment opportunities
in current market.

Purpose

Empower clients to pick
stocks with clarity.

Diagnostic Tool

Is This For You?



Match (YES)

- Wants independent final decision and Demat transaction control.
- Needs alternatives to Mutual Funds and PMS.
- Lacks time/expertise for deep research.
- Wary of free financial advice.



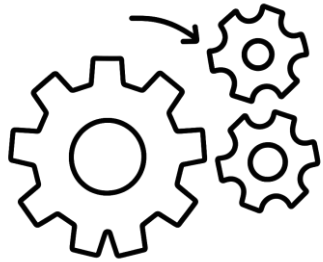
Mismatch (NO)

- Wants Private Equity, F&O, or Intraday advice.
- Needs personalized stock service.
- Monitors portfolios frequently, or fears volatility.
- Has a horizon of less than 3 years.
- Seeks short-term tips.

Why finding promising stocks is difficult.

Success hinges on an individual's ability to make timely decisions backed by deep knowledge, strong conviction, and enduring patience.

The Process Gap



Lack of a disciplined research process.

The Skill Gap



Lack of time and expertise; reluctance to seek expert guidance.

The Trust Gap

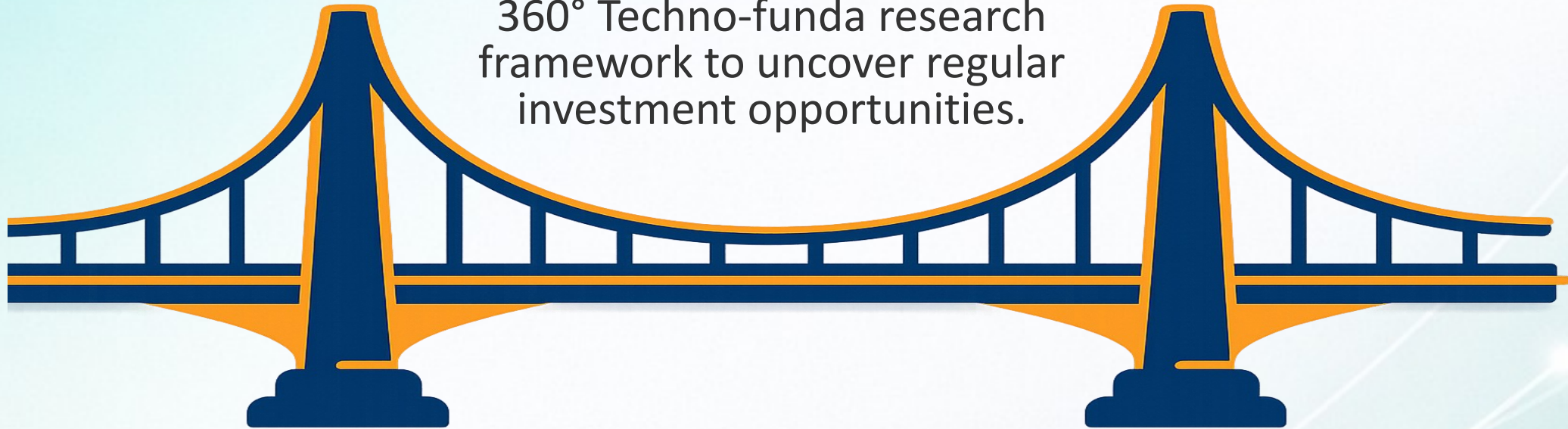


The market is filled with opaque tips, and misaligned incentives.

Bridging the Gap: Our Approach

Robust Process

360° Techno-funda research framework to uncover regular investment opportunities.



Skilled Professional

Qualified research professional that uses a calibrated process to pick and recommend stocks with rationale.

SEBI-Registered Service

An accountable service where "Client Benefit Always First" is the core business philosophy.

Our Methodology

Repeatable, 360° Techno-funda Research



The Discovery Framework: IF.ITS.SMS

The criteria every recommendation must meet.



What You Receive: Insights, Not Just Tips.

New Ideas Discovery



Detailed report explaining the IF.ITS.SMS rationale.

Cadence: As discovered (quality over quantity).

Existing Ideas Updates



Concise notes for stocks under active coverage.

Cadence: As needed (based on material changes).

Note: We provide insights; clients retain full control over final investment decisions.

Commercial Models

Investment Universe: BSE & NSE Listed Stocks | Strategy: Buy and Hold

New Client Plan

Nominal fixed fee.

Designed for a first-time client to experience the service.

Existing Client Plan

**~89% Variable Fee
(Performance-linked).**

Aligned with client's investment success.

Note: Annual Subscription Plans. Full fee details provided during the **Discovery Connect**.

Why Choose My Equity Sherpa?



Fair Policy

Equal distribution of new ideas to all subscribers simultaneously.



Skin in the Game

Owner invests alongside clients.



Aligned Goals

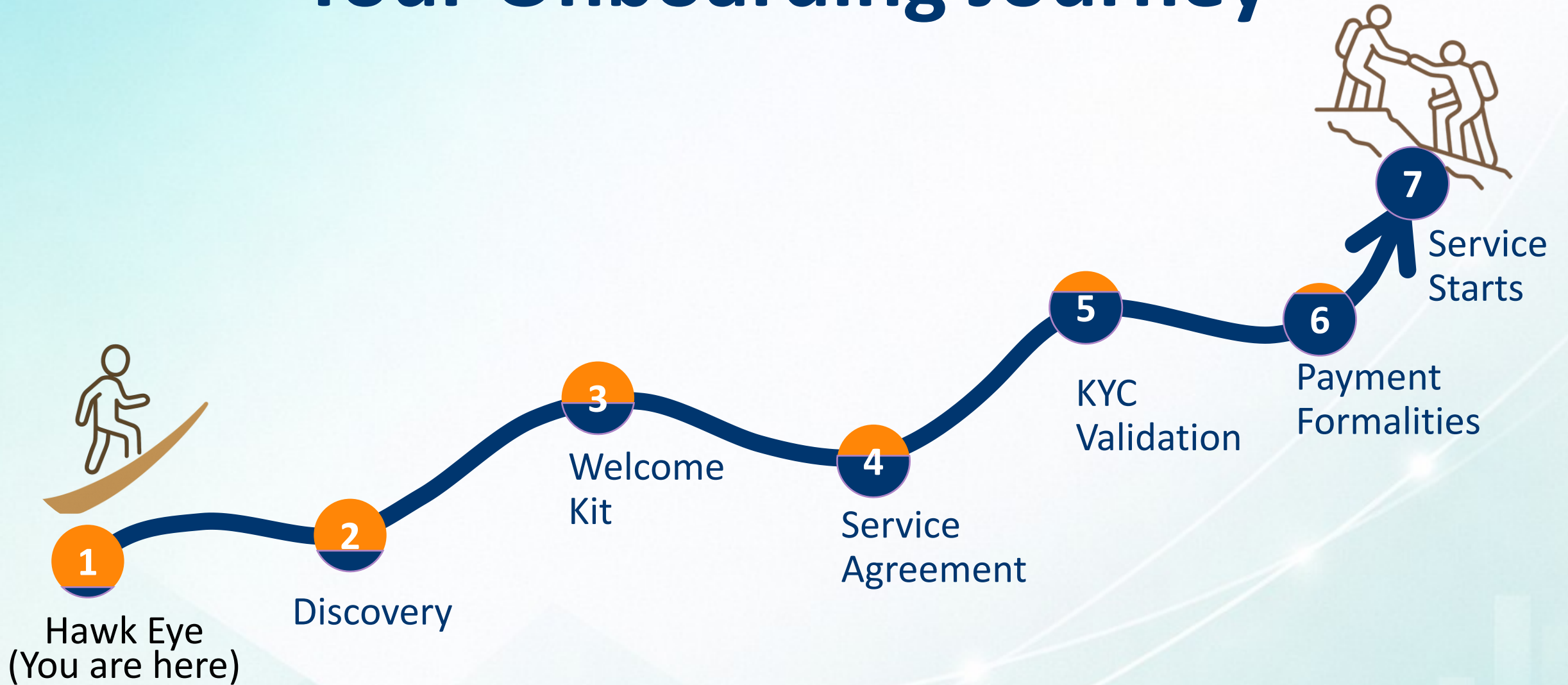
Your success defines ours.



Calibrated Process

Spot ideas regularly through a disciplined framework.

Your Onboarding Journey



Next Steps

This is Step 1 of your onboarding journey.

For deeper insights and to move to the **Discovery phase**, contact us.



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<https://myequitysherpa.in>



<https://www.linkedin.com/company/myequitysherpa>

Warning: Investment in securities market are subject to market risks. Read all the related documents carefully before investing.

Disclaimer: Registration granted by SEBI, enlistment with BSE and certification from NISM in no way guarantee performance of the intermediary or provide any assurance of returns to investors.