



# 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.

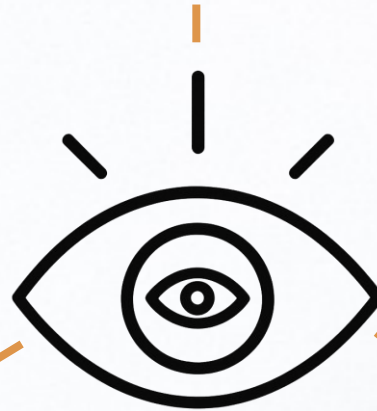
- **Founder & Managing Owner:** Surender Singh
- **Registered Name of the Research Analyst:** Surender Singh  
(Proprietor: **My Equity Sherpa**)

- **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.



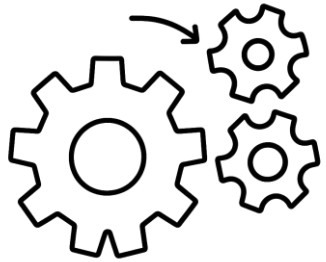
## Mismatch (NO)

- 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

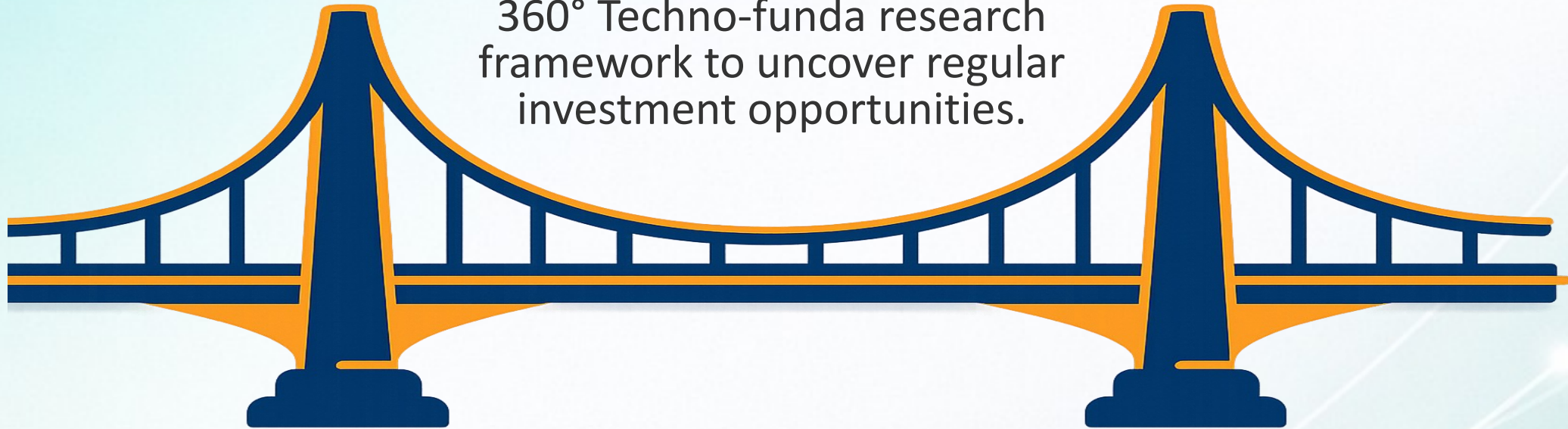


The market is filled with opaque tips, and misaligned incentives.

# 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.