



MY EQUITY SHERPA

Your Stock Research Partner

Empowering YOU to invest in mispriced Indian stocks through a disciplined research process — anchored in fundamentals and guided by technicals.

About Us

My Equity Sherpa is the brand name used by Surender Singh to provide stock research service to retail investors — answering what to invest in, why, and when.



Philosophy

A 'Buy and Hold' (Positional Trade) approach focused on market-cap agnostic ideas.

"Your Success Defines Ours."

Founder & Managing Owner

Surender Singh

Registered Name of the Research Analyst

Surender Singh Proprietor My Equity Sherpa



CREDENTIALS

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 the current
market.



Purpose

Empower clients to pick stocks
with clarity.

Is This For You?



Match

- 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

- 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

01



Robust Process

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

02



Skilled Professional

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

03

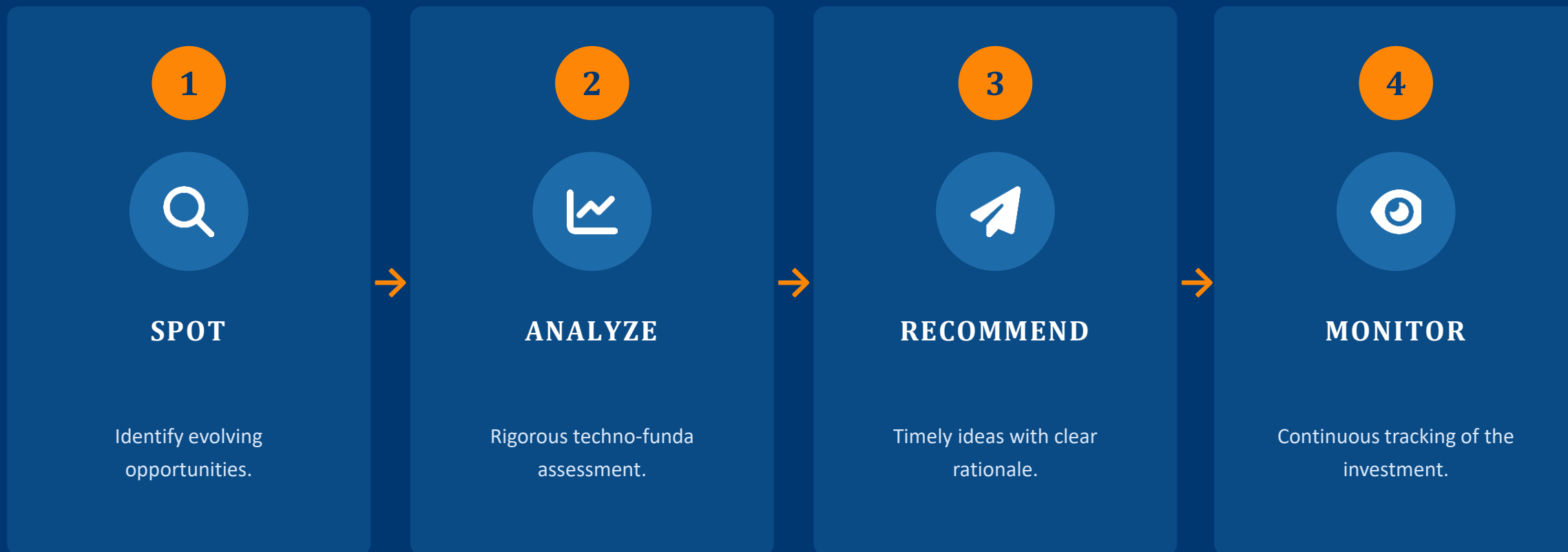


SEBI-Registered Service

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.



New Idea Discovery

A fresh opportunity, identified through our disciplined framework.



Detailed Report with Rationale

Every recommendation is delivered with clear, documented reasoning.

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.

Our Stock Research Plan

One Plan (IF.ITS.SMS). One Goal. A deliberate choice to focus entirely on delivering our best ideas.



YOU MUST KNOW

- Yearly 12~20 new ideas discovery[^]
- Detailed research reports
- Buy and Hold Approach (Cash Buy)
- Medium-Term (2~3 Yrs.) Perspective
- Evolving updates for existing ideas
- 🏷️ Fee Details*: Available on request at support@myequitysherpa.in

- ▶ [^] On a regular basis, new businesses are researched. Reports are published with appropriate recommendations, enabling swift action when market price becomes favorable. Hence, not every idea would carry a “Buy” or “Accumulate” rating at the time of initiation.

- ▶ Fee is refundable on a pro-rata basis for the unused period.
- ▶ All communications will be sent to the client’s registered email ID.
- ▶ More details are provided in the Terms & Conditions disclosure.
- ▶ Entire market is our universe.
- ▶ Clients retain full control over their account, and final decisions.
- ▶ Stocks are inherently volatile asset class. Hence, distribute capital in 5 to 20 stocks, calibrated to your conviction and risk tolerance.

Why Choose My Equity Sherpa?



Fair Policy

Equal distribution of new ideas to all subscribers simultaneously.



Skin in the Game

Owner invests alongside clients.



Calibrated Process

Spot ideas regularly through a disciplined framework.



Aligned Goals

Your success defines ours.

Your Onboarding Journey

Hawk Eye

(You are here)

Welcome Kit

Service Agreement

Service Starts

1

2

3

4

5

6

7

Discovery

KYC Validation

Payment Formalities

Next Steps

This is Step 1 of your onboarding journey. For deeper insights and to move to the Discovery phase, contact us.



+91 899.947.4310



support@myequitysherpa.in



<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.

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