



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 professional 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

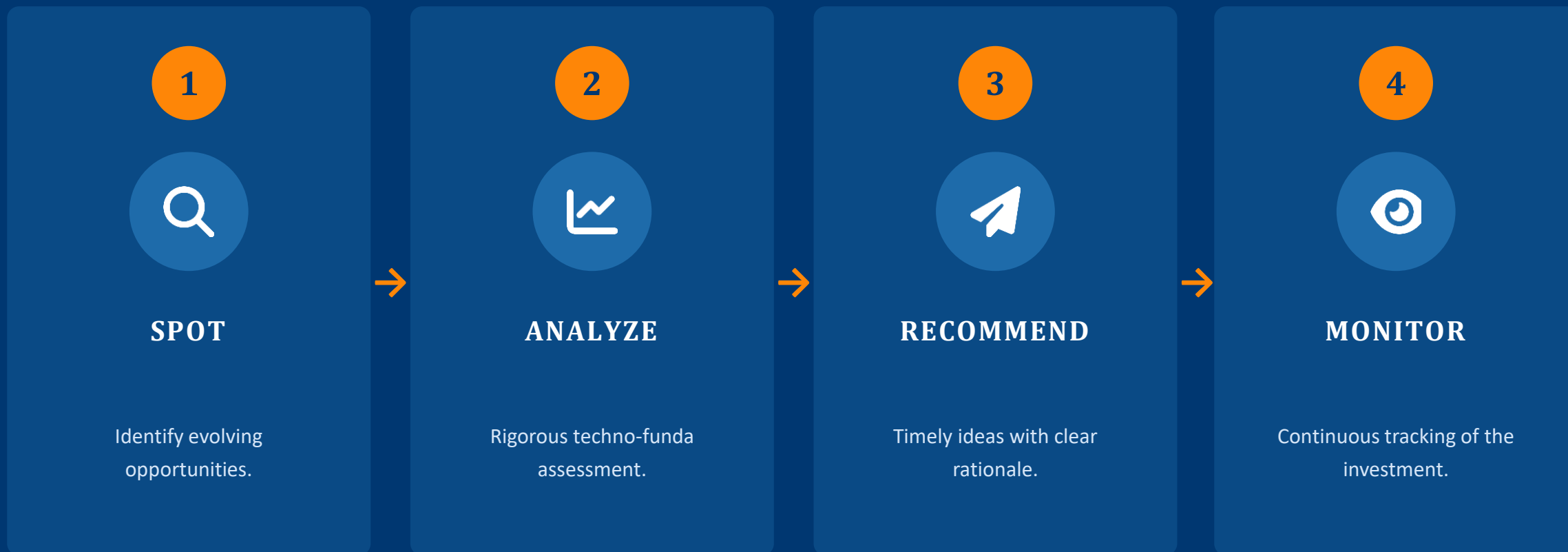


SEBI-Registered Service

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

Our Methodology

Repeatable, 360° Techno-funda Research



Our Offered Plans

Two plans, one goal: delivering our best ideas. Choose the plan that suits your style.

SPIN

Stock Portfolio to Invest Now • 5 stocks • Investment Horizon: 3~5 years

- ▶ **Universe:** Entire market
- ▶ **Key feature:** Non-correlated stocks
- ▶ **Benchmark:** Nifty Total Market
- ▶ **Deliverable 1:** Stock list, allocation weights and rationale (one-time fee)
- ▶ **Deliverable 2:** Quarterly evolving updates and rebalancing opinion (with recurrent fee)

FEE DETAILS

- ▶ **One-time onboarding enrolment:** ₹5,900 (non-refundable) – research report with stock list, weights and rationale
- ▶ **Recurrent annual (optional):** ₹7,080, refundable pro-rata for the unused period – quarterly updates and rebalancing opinion

IF.ITS.SMS

Improving Fundamentals + Interesting Technical Setups + Still Mis-Priced Stocks

- ▶ **New ideas discovery:** yearly 12~20 ^
- ▶ **Detailed research report** for new ideas
- ▶ **Evolving updates** on existing ideas
- ▶ **Approach:** Buy and Hold (Cash Buy)
- ▶ **Perspective:** Medium-term (2~3 years)
- ▶ **Universe:** Entire market

FEE DETAILS *

- ▶ Majorly variable – at your discretion. Connect now for details.
- ▶ Refundable on a pro-rata basis for the unused period.

YOU MUST KNOW

- ▶ All communications are sent to the client's registered email ID.
- ▶ Read the Terms & Conditions disclosure for all details.
- ▶ Clients retain full control over their account and final investment decisions.
- ▶ Stocks are an inherently volatile asset class. Expect drawdowns in your investment journey.

- ▶ ^ IF.ITS.SMS: We aim to earn most of the variable fee at your discretion, so we focus on publishing ideas rated "Buy" or "Accumulate". When none qualify, we publish reports on compelling businesses to build our ideas library, so the number of Buy/Accumulate ideas may be lower than 12~20.
- ▶ **IF.ITS.SMS:** volatility can be mitigated to an extent by diversification, i.e. invest 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.

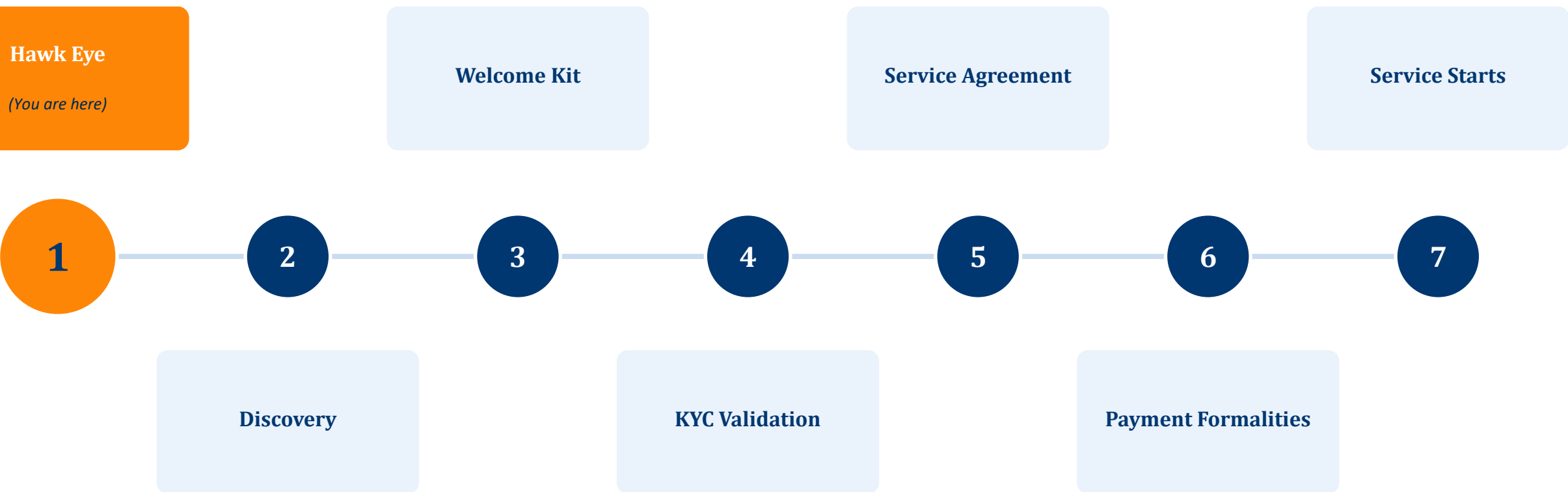


Aligned Goals

Your success defines ours.

Your Onboarding Journey

Post Discovery (your due diligence time), process usually closes in 24 hours.



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.

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