

Matchmaker, matchmaker, make me a match.

Find me a find, catch me a catch.

Matchmaker, matchmaker, look through your book and make me a perfect match.

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Single and over 50, Mom says "It's time." So, what's a girl to do? I've got to find me a match. (But not the kind Mom was thinking.)

The information contained herein is for educational use only and should not be construed as tax, financial, or legal advice. Each individual's situation is unique and may require specialized treatment. It is, therefore, imperative that you consult with tax and legal professionals prior to implementation of any strategies discussed.

I. Definitions

- A. Fundamental Analysis – Investor uses the results of a company's past performance to forecast future stock price movements and determine whether stock is under- or over-valued
- B. Technical Analysis – Investor believes that every stock is affected by the market as a whole and thus relies on graphical data to project future price trends and cycles

*Matchmaker, matchmaker, I'll bring the veil.
You bring the groom, slender and pale.
Bring me a ring,
for I'm longing to be the envy of all I see.*



Securities Analysis

Fundamental

- Company-specific
- Internal factors
- Principles of Accounting
- Financial Statements
- Formula Analysis
- Use α to measure
- Business Risk

Technical

- Big picture
- External factors
- Theories of Economics
- Charts & Graphs
- Trendlines & Patterns
- Use β to measure
- Market (Systematic) Risk

Dear Yenta, see that he's gentle. Remember, you were also a bride. It's not that I'm sentimental. It's just that I'm terrified!



II. Basics of Accounting

- Journal Entries
- Account Types (Asset, Liability, Equity, Revenue, and Expense)
- Debits and Credits

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III. Financial Statements

*For Papa, make him a scholar.
For Mama, make him rich as a king.
For me, well, I wouldn't holler
if he were as handsome as anything.*



- Income Statement – how the company made and spent money over a period of time
- Retained Earnings Statement – what the company did with its money
- Balance Sheet – a snapshot of the company's financial condition at a specific point in time
- Footnotes – detailed explanations for all the numbers

IV. In the words of Rudyard Kipling, "And never the two shall meet..." Or do they?

- Fundamentalists select the eligible bachelor.
- Technicians set the date for the wedding.



*Matchmaker, matchmaker,
plan me no plans. I'm in no rush.
Maybe I've learned playing with
matches a girl can get burned. So
bring me no ring, groom me no
groom, find me no find, catch me no
catch unless he's a matchless match!*

V. Success Stories

*Hodel, oh Hodel,
have I made a match
for you. He's
handsome! He's
young! All right, he's
62. But he's a nice
man, a good catch.
True? True!
Chava! I've found
him! Will you be a
lucky bride! He's
handsome. He's tall!
That is, from side to
side. But he's a nice
man, a good catch,
Right? Right!*



- Peter Lynch: In 1977, Fidelity Magellan had \$18 million in assets when Lynch took charge and grew to \$14 billion by 1990 when Lynch retired (averaging 29.2% annual return)
- Warren Buffet: \$10,000 invested in 1965 is worth over \$47 billion today (making him the 3rd wealthiest man in the world, after Carlos Helu of Telecom Mexico and Bill Gates of Microsoft)
- Anne Scheiber: Retired from IRS with \$5,000 lump-sum plus \$3,150 annual pension and grew this to over \$22 million by the time she died at age 101 in 1995 (she donated her entire wealth to the Yeshiva University)



VI. Don't get divorced!

*Matchmaker, matchmaker, you know that I'm still very young. Please, take your time.
Up to this minute, I've misunderstood that I could get stuck for good.*

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