



## **Equity Research Report Writing: a programme of training and coaching**

Kairos Training Limited

[www.kairostraining.co.uk](http://www.kairostraining.co.uk)

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## Equity Research Report Writing

You're reading this because you want your research reports to stand out from the crowd.

You're not alone. I've already worked with research analysts at:

**ABN Amro**  
**BBVA**  
**BNP Paribas**  
**Deutsche Bank**

**Fortis**  
**Merrill Lynch**  
**Morgan Stanley**  
**RBS**

I train teams and coach individuals. I work on site and at distance, by email or on the phone. My Slideshare presentation, [Writing an Equity Research Report](#), has enjoyed over 33,000 hits.

You might be writing sell-side or buy-side reports, initiating coverage reports, issue reports, investor notes or sector reports. Whatever you write, wherever you are, and however you'd like to learn, I can help.

Contact me to discuss your needs and plan a programme of learning.

[alanbarker830@btinternet.com](mailto:alanbarker830@btinternet.com)

The trainer was an expert who did not just deliver the course material. Absolutely fascinating and inspiring.

*Business Manager, ING*

## Equity Research Report Writing: four modules

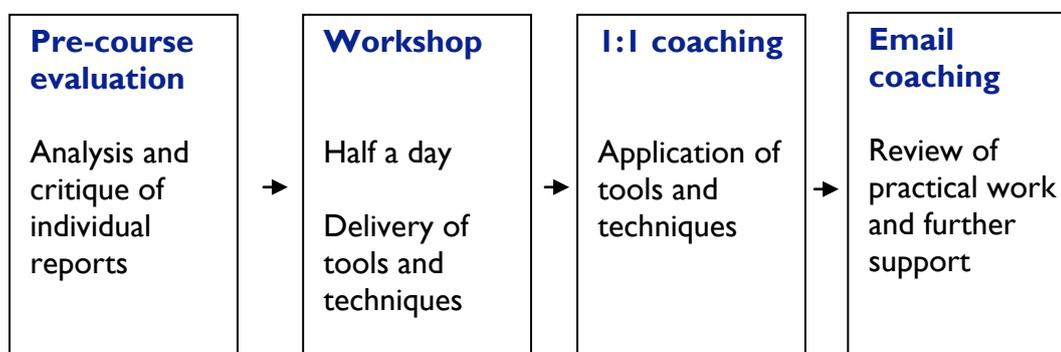
How can you make your reports unique? Everyone has access to the same information (presumably); your task is to find the investment ideas that will provoke clients to trade.

You may already use templates and protocols; you almost certainly write reports that look and sound a lot like all the other reports produced by your peers, both in your own firm and in your closest competitors.

This programme will help you and your team write more engagingly and more persuasively.

As with any skills training, this programme will only be as effective as its implementation. This programme therefore consists of four modules. You can choose any one of these modules, or any combination.

- Pre-course evaluation of individuals' reports, with annotated critique
- A half-day workshop for no more than **five** people to deliver the essential tools and techniques of effective report production
- I:I coaching sessions to apply those tools directly to team members' own work
- Follow-up coaching by email to review progress in implementing the tools and techniques and provide further support



Contact me to discuss contractual details.

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## Equity Research Report Writing: objectives and key ideas

**Any report is an exercise in persuasion.** Your research reports need to stand out from the hundreds of others your reader sees. Whether you are writing for sales consultants at BBVA or directly for clients, your task is to persuade your reader to:

- start reading – and to continue reading;
- take your ideas seriously; and
- to deal.

**The key to writing effective research is to be able to generate and organise interesting ideas.** How to create a powerful investment idea? How to support that idea with other ideas and information, coherently organised and clearly expressed? How to hold the reader's attention?

**This intensive training will help you turn research into winning ideas.** It introduces uniquely powerful techniques for producing effective, persuasive research reports.

### Objectives

As a result of attending this training, you will be able to:

- create persuasive reports;
- generate interesting ideas;
- organise information coherently;
- fulfil the structural requirements of reporting templates;
- take command of language in your reports; and
- bring your writing to life.

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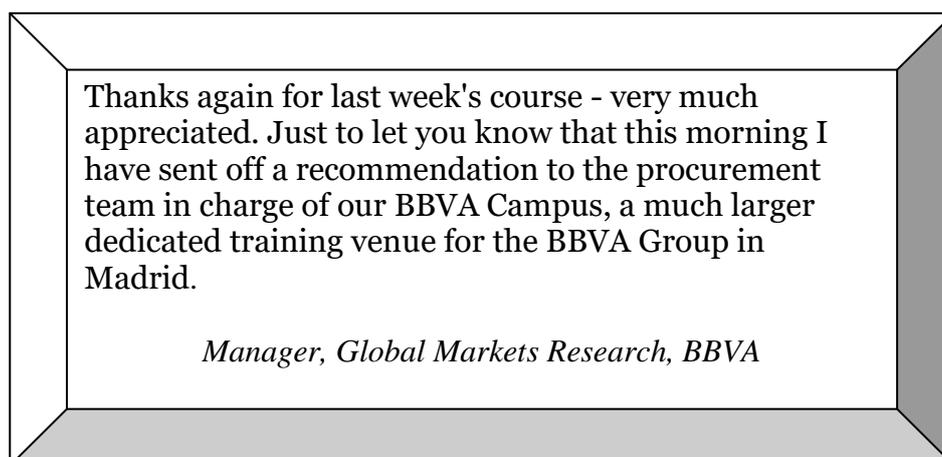
## Equity Research Report Writing: pre-course evaluation

If you choose the pre-course evaluation module, you'll be invited to send one example of a report to the trainer for analysis and critique.

Documents will be analysed for the following elements.

- **Power and logic of argumentation**
- **Clarity of explanation**
- **Use of evidence to support investment arguments**
  
- **Paragraph construction**
- **Sentence construction**
- **Use of appropriate vocabulary**
  
- **Dynamics of style**
- **Readability**
  
- **Use of grammar, punctuation and stylistic devices**

Feedback can be given as stand-alone notes. They can also inform work in other modules of the training.



## Equity Research Report Writing: workshop outline

### Introduction and objectives

#### Vital statistics

- your reports in the market
- the need to be unique

#### Squaring the circle

- why reports fail
- creating quality fast

#### Planning the report

- objective, audience, message
- mapping the material

#### Creating a message

- the value chain: data, information, ideas
- what's the investment idea?

#### Building the front page

- generating bullet points from your message
- key features of effective bullet points
- highlights that don't fade: investment and fundamental

#### Producing an effective synopsis

- the power of summarising
- presenting unique thinking

### Developing the report body

- organising ideas coherently
- argument and explanation: core techniques
- outlining and drafting

### Producing the draft

- working from your outline
- tips for drafting efficiently

### Editing: a systematic approach

- why you can't afford not to edit
- making the most of your time
- using readability statistics

### Punchy paragraphs

- the four characteristics of effective paragraphs
- sequencing paragraphs into sections

### Sentences that speak to the reader

- finding the problem fast
- reconstructing problem sentences

### Making the words work for you

- Clearing the fog
- Using vigorous verbs
- denominalising
- developing a vibrant vocabulary

### Action session

- review of the workshop
- identifying key actions to take forward

The tutor made the class very interactive. He explained his points very clearly and simply.

*International MA student, Regents Business School*

## **Equity Research Report Writing: coaching**

Coaching adds considerable value to the learning experience.

Working 1:1, we can apply the tools and techniques introduced in the workshop directly to your own work. You can make quantum improvements to real reports that will then go out into the market under your name. By reviewing the practical work and enjoying further support from the coach, you will embed improvements in your skills and enjoy long-term benefits from a one-off investment in learning.

Coaching is costed on an hourly basis. We can coach on site, by email or on the phone. And, of course, we can combine media. Skype coaching can cut costs and save time.

Enjoy the full learning experience that comes from combining training and coaching, and make a valuable investment in your career.

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## Trainer profile

**Alan Barker** is Managing Director of Kairos Training Limited. He has over twenty years' experience in training communication and thinking skills. Alan has an MA in English from the University of Cambridge and was a professional actor before becoming a training consultant in 1989.



Clients in the financial sector include The Chartered Institute of Insurance, DHL Finance Services (Maastricht, Brussels, Bahrain), Exane BNP Paribas (London, Paris), Fortis Investments (Brussels), HSBC (London, Chicago, Panama), ING (London), The Institute of Chartered Accountants in England and Wales, M&G, Morley Fund Management, and Sloane Robinson.

Other clients include BT, The British Museum, The European Commission (Brussels), Genesis Housing Group, Imperial War Museums, Jones Lang LaSalle (London, Prague, Moscow, Warsaw), Korean National Diplomatic Academy, The London Assembly, The Natural History Museum, Regents Business School, SQW, The Victoria and Albert Museum, and York Consulting.

Alan's eighteen books include **Improve Your Communication Skills**, **Creativity at Work**, **How to Solve Almost Any Problem**, **How to Write an Essay**, **30 minutes to brainstorm great ideas**, **Writing at work**, **How to be a better decision maker**, **Managing meetings** and **How to be better at managing people**. **The Alchemy of Innovation** by Spiro Press in 2002. Alan's books have been translated into 13 languages.

Alan's Slideshare presentation, *Writing an Equity Research Report*, has been viewed over 33,000 times.

