

Report writing skills for equity researchers

Every research report is an exercise in persuasion. Your reports need to stand out from the hundreds of others your reader sees. Whether you are writing for sales consultants 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.

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

Business Manager, ING

Kairos Training Limited

MANAGING DIRECTORS Alan Barker Gillian Barker
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Report writing skills for equity researchers

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.

Pre-course submission of reports

To allow for pre-course evaluation, participants would be invited to send one example of their writing **at least two weeks** before the training.

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Pre-course evaluation

Prior to the workshop, each team member will 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**

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Training workshop: outline programme (half a day or a day)

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

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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

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