

# CLAUDE FOR FINANCE

MBA Alumni Session — Practical AI for Investment Professionals

60 Minutes

Free Plan Only

From equity research to financial models — all on the free plan



### 01. Claude Basics (10 min)

What it can do · Prompting that works



### 02. 6 Use Cases (20 min)

Equity research · Morning notes · Catalysts · Earnings



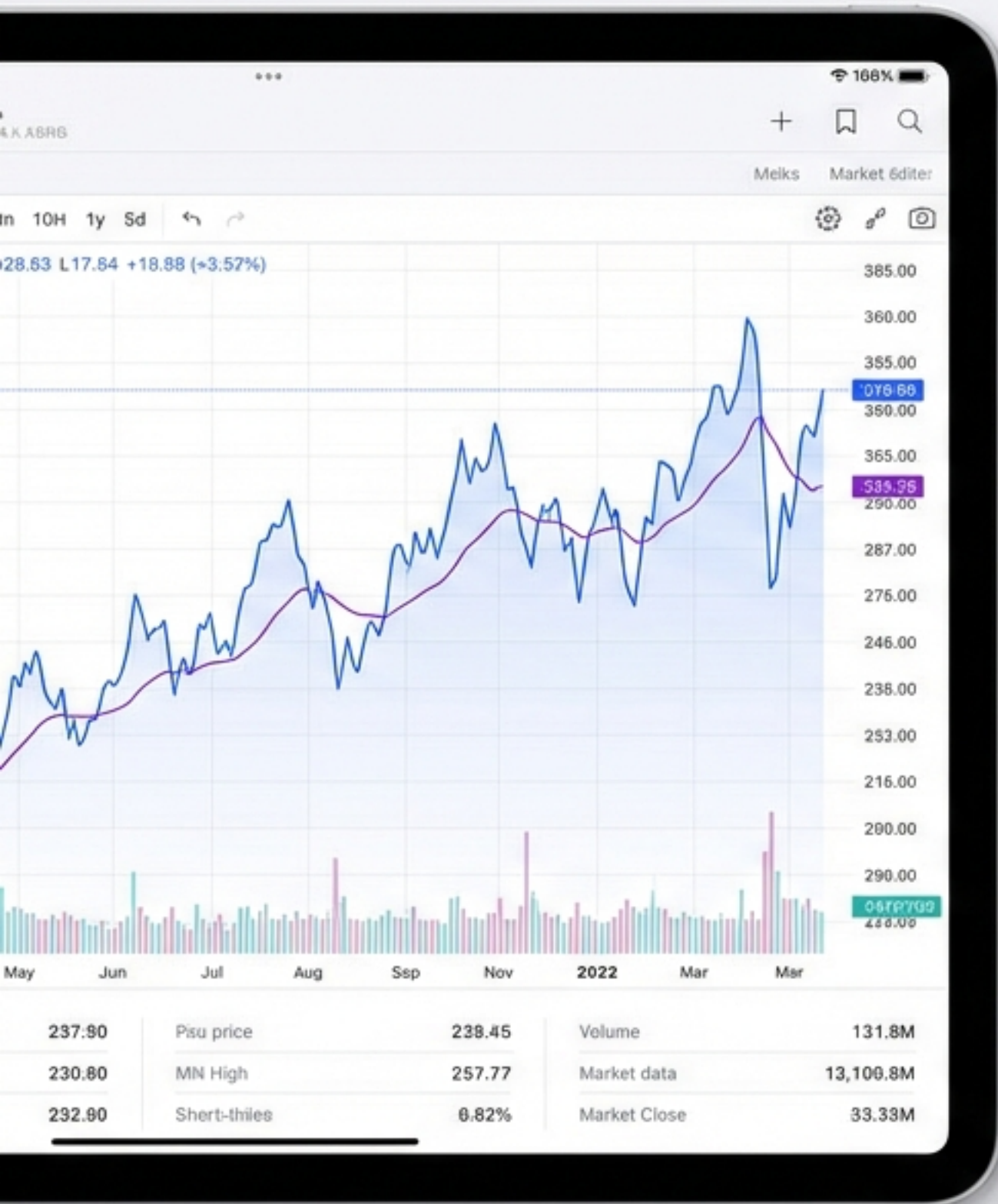
### 03. The Hack (15 min)

Pro Outputs for Free: Skills + Plugins · Models · Audit



### 04. Q&A (15 min)

Your Use Cases Live: Bring your stocks and workflows



# WHAT CLAUDE CAN EXECUTE

- ✓ Write institutional-grade equity research reports
- ✓ Analyse news events and their market impact
- ✓ Build stock one-pagers from your brief
- ✓ Draft morning notes and catalyst calendars
- ✓ Generate earnings beat/miss analysis
- ✓ Create financial models with structured prompting
- ✓ Backtest strategy logic and summarise results

## **WATCH OUT FOR**

Real-time price data (no live feed)

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Exact future predictions (it reasons, not predicts)

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Regulatory filings it hasn't been given

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Portfolio execution or trading orders

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Hallucinations in specific numbers — always verify

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Compliance sign-off — it's a research assistant, not a regulator

# THE 6 RULES OF FINANCE PROMPTING

**1**

Give a Role (e.g., Senior equity analyst at a bulge-bracket bank)

**2**

Specify Output Format (e.g., 2-page report, Exec Summary, Valuation)

**3**

Provide Context (Paste financials/news. It only knows what you give it)

**4**

Use Follow-Up Prompts (Iterate for bear cases or audience changes)

**5**

Skills = SOPs  
(Build once → Claude follows workflow every time)

**6**

Iterate, Don't Restart  
(Keep conversation going to refine output)

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# 6 USE CASES

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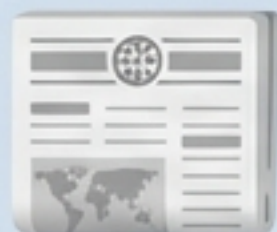
Free Plan Edition · Live demos · Bring your stocks

# FREE PLAN EXECUTIONS (1/2)



## Equity Research Report

Fundamental + technical analysis. Buy/Hold/Sell + target price.



## Market Impact Manual

How news moves commodities, currencies & indices.



## Stock One-Pager

NSE/BSE snapshot in minutes. Key metrics + thesis in 1 page.

# FREE PLAN EXECUTIONS (2/2)



## Morning Note

Daily market brief. Coverage stocks + trade ideas.



## Catalyst Calendar

Earnings, RBI decisions, product launches, macro events.



## Earnings Analysis

Beat/miss breakdown. Updated estimates + revised thesis.

# THE RESEARCH PROMPT



“ You are a senior equity analyst... Write a detailed Buy/Hold/Sell research report... Include: Exec Summary, Business moat, Financials (Ind AS), DCF Valuation, Bull/Base/Bear scenarios.”



10–15 page institutional-grade report · 3-scenario valuation model · Ready-to-use in client presentations

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# THE HACK

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Pro Outputs on the Free Plan • Skills • Plugins • Models

# WHAT ARE SKILLS? (YOUR AI SOPs)

A Skill is a pre-written instruction file you give to Claude. Think of it like an SOP.



**You write it once → Claude follows it forever.**

**No re-prompting. No explaining your format every time.**

India Equity Research

News Impact

Stock One-Pager

Morning Note

Catalyst Calendar

Earnings Analysis

Pro Financial Model

Strategy Backtesting

# THE FREE PLAN WORKAROUND



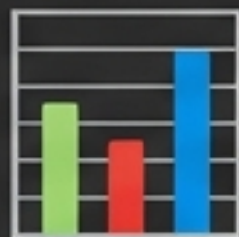
Certain plugin-powered artifacts and shared Claude Projects built by Pro users are publicly accessible. You can use their full output without a paid account.

Web Search

PDF Analysis

Live Data Tools

Shared Templates



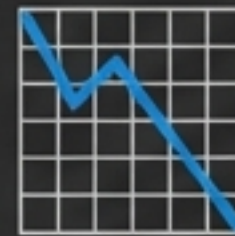
## Institutional Financial Model

Revenue, EBITDA, PAT  
5-year forecast.  
DCF + Comparable Company  
Analysis.  
Ind AS compliant.



## Strategy Backtesting

Test vs Nifty 50 benchmark.  
Sharpe ratio, max drawdown.  
Plain English rules.  
No coding.



## Trading Audit Dashboard

Broker CSV upload.  
P&L breakdown.  
Behavioural pattern analysis.  
Monte Carlo 2026 projections.



# THE INSIDER'S PLAYBOOK

Everything covered today is free,  
practical, and ready to use on Monday.

- ✓ Install the shared Skill files in your workspace (takes 2 minutes).
- ✓ Use the provided prompt templates against your active coverage stocks.
- ✓ Start with a single use case this week — Equity Research or Morning Note.
- ✓ Bookmark the Plugin workaround link for Pro-tier tool access.

[Start Executing](#)