

CLAUDE FOR FINANCE

Prompt Library

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9 Ready-to-Use Prompts · Free Plan · No Coding Required

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HOW TO USE THIS GUIDE

1. Open claude.ai in your browser (free account is sufficient).
2. Start a new conversation.
3. Copy any prompt from the coloured boxes below and paste it directly into Claude.
4. Replace the [COMPANY NAME], [TICKER], [SECTOR] placeholders with your own details.
5. Use the follow-up prompts to iterate and refine the output.

Each prompt is designed to work on the Claude free plan. No plugins, no API key, no paid subscription needed for the core use cases.

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01 Indian Equity Research Report

Generates an institutional-grade Buy/Hold/Sell research report for any NSE/BSE-listed stock. Claude fetches live price data, financials from Screener.in, management commentary, and sector context — then structures it like a bulge-bracket research note.

PROMPT – COPY & PASTE INTO CLAUDE

You are a senior equity analyst at a top-tier Indian brokerage house.

Generate a comprehensive institutional-quality equity research report for:

Company: [COMPANY NAME]

NSE Ticker: [TICKER]

Sector: [SECTOR]

The report must include:

1. EXECUTIVE SUMMARY

- Investment recommendation: BUY / HOLD / SELL
- Current Market Price (CMP): fetch live from Google Finance
- 12-month target price with upside/downside %
- 3 key reasons for the recommendation in bullet points

2. BUSINESS OVERVIEW

- Core business model and revenue streams
- Competitive moat and market positioning
- Key products/services and geographic presence

3. FINANCIAL ANALYSIS (last 3 years + TTM)

- Revenue, EBITDA, PAT trend
- Key ratios: P/E, EV/EBITDA, P/B, ROE, ROCE, D/E
- Cash flow health

4. VALUATION

- DCF-based intrinsic value
- Peer comparison (EV/EBITDA vs 3 listed peers)
- Target price derivation

5. BULL / BASE / BEAR CASE SCENARIOS

- Price targets and triggers for each scenario

6. KEY RISKS

- Business, sector, macro, and regulatory risks

7. FINAL VERDICT

- Recommendation, target price, and investment horizon

Use Ind AS accounting standards. Cite data sources. Tone: institutional, factual, data-driven.

FOLLOW-UP PROMPTS

- "Now add a detailed technical analysis section — RSI, MACD, support/resistance levels."
- "Rewrite the executive summary as a 3-sentence SMS-style alert for a PM."
- "Build a bear case — what would make this a SELL?"
- "Compare this stock against its top 3 NSE peers on key multiples."
- "Create a one-paragraph investment thesis I can use in a client email."

02 Stock One-Pager

Produces a concise, decision-ready one-page snapshot covering fundamentals and technicals side-by-side. Faster than the full report — great for watchlist screening and quick checks before a call.

PROMPT — COPY & PASTE INTO CLAUDE

You are an equity analyst. Create a concise one-page stock snapshot for:

Company: [COMPANY NAME]

NSE Ticker: [TICKER]

Structure it as two columns:

LEFT COLUMN — FUNDAMENTALS

- CMP (fetch live), 52-week high/low, market cap
- Revenue, Net Profit, EPS (TTM)
- P/E, P/B, ROE, ROCE, D/E ratio
- Promoter holding %, FII holding %
- 3-year revenue and profit CAGR

RIGHT COLUMN — TECHNICALS

- Trend (uptrend / downtrend / sideways)
- RSI (14-day) and what it signals
- 50-day and 200-day moving average status
- Key support and resistance levels
- Recent chart pattern (if any)

BOTTOM SECTION — QUICK VERDICT

- 3-line summary: what the numbers say, what the chart says, one-line view
- Suggested action: BUY / HOLD / WATCH / AVOID
- Biggest risk in one sentence

Keep the entire output to one page. Be crisp. No padding.

FOLLOW-UP PROMPTS

- "Do the same for [TICKER 2] and [TICKER 3] — give me all three for comparison."
- "Flag any red flags in the promoter holding or pledging data."
- "Rate this stock 1-10 on quality vs valuation vs momentum."

03 Morning Note

Drafts a tight, opinionated morning note in the format used by sell-side analysts at 7am. Leads with the one thing PMs need to hear, then covers key stocks, macro events, and trade ideas for the day.

PROMPT – COPY & PASTE INTO CLAUDE


You are a sell-side equity analyst at an Indian brokerage. Draft today's morning note.


My coverage universe: [LIST YOUR STOCKS e.g. RELIANCE, HDFCBANK, INFY, DIXON, TCS]

Analyst name: [YOUR NAME]

Date: [TODAY'S DATE]

Format:

 TOP CALL: [The single most important thing for PMs to act on today]
[2-3 sentences: what happened, why it matters, price/rating implication]

 OVERNIGHT / PRE-MARKET

- Global markets: [key moves – US futures, oil, gold, USD/INR]
- Key economic data today: [any RBI, CPI, GDP, Fed events]

 COVERAGE STOCKS – WHAT'S MOVING

For each relevant stock: 1-2 sentence update + "what to do"

 TODAY'S WATCH LIST

- Key events, results, or news expected today
- Any stocks to add/remove from coverage radar

 TRADE IDEA OF THE DAY

Stock: / Entry zone: / Target: / Stop-loss: / Rationale:

Keep it under one page. Be opinionated – PMs hate wishy-washy notes.

FOLLOW-UP PROMPTS

- "Rewrite for a WhatsApp group — max 5 bullet points, no formatting."
- "Add a trade idea for [SPECIFIC STOCK] based on yesterday's move."
- "Draft the same note but for a retail investor audience."

04 News & Market Impact Manual

Analyses how a specific macro or geopolitical news event impacts a commodity, currency, or index. Fetches current prices from approved sources, structures the analysis in 3 scenarios, and outputs in Morgan Stanley-style research format.

PROMPT – COPY & PASTE INTO CLAUDE

You are a macro research analyst at an institutional asset manager.

Create a one-page Market Impact Manual for the following:

News Event: [DESCRIBE THE EVENT – e.g. "US Fed holds rates at 5.25% – signals 2 cuts in 2025"]

Asset / Instrument: [e.g. GOLD / XAUUSD / USD/INR / NIFTY 50 / CRUDE OIL]

Structure the manual as:

HEADLINE: [Event] → [Asset] – [Bull/Bear/Neutral signal in one line]

SECTION 1 – CURRENT PRICE CONTEXT

- Fetch current price from a live source
- Recent trend (30-day, 90-day)
- Key technical levels (support / resistance)

SECTION 2 – IMPACT ANALYSIS

Direct impact: How does this event mechanically affect the asset?

Indirect channels: What second-order effects matter?

Historical precedent: How did similar events affect this asset in the past?

SECTION 3 – SCENARIOS

BULL CASE: [Price target, trigger, probability]

BASE CASE: [Price target, trigger, probability]

BEAR CASE: [Price target, trigger, probability]

SECTION 4 – POSITIONING RECOMMENDATION

- What should a portfolio manager do right now?
- Hedge or express? Timeframe?

Use only verified data. Cite sources. Keep it to one page.

FOLLOW-UP PROMPTS

- "Now do the same analysis for [SECOND ASSET] given the same event."
- "How does this affect Indian IT stocks specifically?"
- "Add a section on INR implications."

05 Catalyst Calendar

Builds a structured calendar of upcoming market-moving events across your portfolio or coverage universe — earnings, RBI decisions, FOMC meetings, product launches, and sector-specific data releases.

PROMPT — COPY & PASTE INTO CLAUDE

You are a portfolio analyst. Build a Catalyst Calendar for the next 4 weeks.

My portfolio / coverage: [LIST STOCKS OR SECTORS e.g. RELIANCE, HDFCBANK, INFY, DIXON, NIFTY]

Include macro events: YES

Time horizon: Next 4 weeks from today ([TODAY'S DATE])

For each catalyst, provide:

Date	Company / Event	Type	What to Watch	Market Impact
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Types: Earnings | Macro | RBI/SEBI | Product Launch | Conference | Technical Level

After the table, add:

TOP 3 HIGHEST IMPACT EVENTS THIS MONTH:

1. [Event] — [Why it matters] — [Positioning implication]
- 2.
- 3.

STOCKS TO WATCH CLOSELY THIS WEEK:

[Ticker]: [Reason]

Search for real upcoming dates. If you cannot confirm a date, mark it as "TBD — verify."

FOLLOW-UP PROMPTS

- "Which of these events is most likely to move [SPECIFIC STOCK] more than 5%?"
- "Add global macro events — FOMC, US CPI, ECB — to the calendar."
- "Flag any calendar clashes where two major events fall in the same week."

06 Earnings Analysis

Creates a fast-turnaround earnings update note in JPMorgan/Goldman format. Leads with beat/miss verdict, quantifies variances, updates estimates, and revises the investment thesis based on new information.

PROMPT – COPY & PASTE INTO CLAUDE

You are an equity analyst covering [COMPANY NAME] (NSE: [TICKER]).

The company has just reported Q[N] FY[YY] results. Analyze the earnings.

CONTEXT I'M PROVIDING:

[PASTE THE EARNINGS RELEASE OR KEY NUMBERS HERE – revenue, EBITDA, PAT, guidance, management commentary]

Structure your earnings update as:

VERDICT: BEAT / MISS / IN-LINE – [One-line headline]

1. RESULTS SCORECARD

Table: Metric | Reported | Estimate | Street Consensus | Beat/Miss %

2. KEY DRIVERS

- What drove the beat/miss? (volume, pricing, margins, one-offs?)
- Which segments performed vs which disappointed?

3. MANAGEMENT COMMENTARY (key quotes/themes)

- Guidance for next quarter/year
- Any strategic announcements

4. ESTIMATE REVISIONS

- FY[next year] Revenue: old → new
- FY[next year] EBITDA: old → new
- FY[next year] EPS: old → new

5. THESIS CHECK

- Does this result change the investment case? Why/why not?
- Updated recommendation and target price

6. WHAT TO WATCH NEXT QUARTER

- 2-3 metrics that will determine the next move

Keep it under 2 pages. Assume the reader already knows the company.

FOLLOW-UP PROMPTS

- "How does this compare to the last 4 quarters — trend analysis."
- "Write a 3-line WhatsApp update for my portfolio group."
- "What questions would a smart PM ask management on the concall?"

07 Pro Financial Model — India

Builds an institutional-grade 25-sheet Excel financial model for any NSE/BSE stock following Goldman Sachs India / Kotak / Motilal Oswal standards. Includes 5-year forecasts, DCF, comparable analysis, and scenario modelling. Requires Claude Code (Pro plan) or the skill installed in Claude web.

PROMPT — COPY & PASTE INTO CLAUDE

```
/pro-financial-model-india [COMPANY NAME] [NSE TICKER]
```

Example:

```
/pro-financial-model-india Dixon Technologies DIXON
```

The model will include:

- 5-year P&L, Balance Sheet, Cash Flow (Ind AS format)
- EBITDA bridge and margin analysis
- DCF valuation with WACC derivation
- EV/EBITDA and P/E peer comparison
- Bull / Base / Bear scenarios
- Sensitivity tables (revenue growth vs margin)
- Management dashboard with KPIs
- All 25 sheets colour-coded and formatted

Note: This prompt uses the /pro-financial-model-india slash command which requires the skill to be installed. During the session, we'll show you how to install it. On Claude web (free), paste the full description above and Claude will attempt to build the model without the skill trigger.

FOLLOW-UP PROMPTS

- "Add a working capital analysis sheet."
- "Build a merger model assuming [COMPANY] acquires [TARGET]."
- "Stress-test the model with a 20% revenue decline in FY26."

08 Backtesting Framework

Tests any trading or investment strategy against 20 years of NSE/BSE data. Computes Sharpe ratio, max drawdown, CAGR, and benchmark comparison vs Nifty 50. Uses real data from Yahoo Finance — no synthetic data.

PROMPT – COPY & PASTE INTO CLAUDE

Backtest the following strategy on Indian equity markets.

STRATEGY DEFINITION:

Asset: [e.g. NIFTY 50 / RELIANCE.NS / a basket of stocks]
Entry Rule: [e.g. Buy when 50-day MA crosses above 200-day MA]
Exit Rule: [e.g. Sell when 50-day MA crosses below 200-day MA]
Position Sizing: [e.g. 100% of capital per trade / equal weight]
Stop Loss: [e.g. 8% below entry / trailing stop]
Rebalancing: [e.g. Monthly / On signal]

ANALYSIS REQUIRED:

1. Total return vs Nifty 50 benchmark (same period)
2. Annualised CAGR
3. Sharpe Ratio and Sortino Ratio
4. Maximum Drawdown and recovery time
5. Win rate and average win/loss ratio
6. Number of trades and average hold period
7. Performance by year (2004-2024)
8. Performance in bull vs bear market regimes

DATA SOURCE: Use Yahoo Finance (yfinance library) for all price data.

TRANSACTION COSTS: Include 0.1% per trade (brokerage + STT + impact).

TIME PERIOD: Maximum available (target 20 years).

Output: Summary statistics table + equity curve chart + year-by-year returns.

FOLLOW-UP PROMPTS

- "Now test the same strategy but with a 15% trailing stop."
- "Compare 3 strategies side by side: MA crossover vs RSI vs buy-and-hold."
- "Which years did this strategy fail and why?"

09 Trading Audit Dashboard

Upload your broker's trade export (Trading 212, IBKR, eToro, MetaTrader — CSV, PDF, or XLSX) and Claude builds a forensic HTML dashboard. Includes equity curve, P&L attribution, behavioural pattern analysis, and 2026 Monte Carlo projections.

PROMPT — COPY & PASTE INTO CLAUDE

I'm uploading my trading history export from [BROKER NAME e.g. Trading 212 / IBKR / eToro].

File attached: [your CSV / PDF / XLSX file]

Build a complete trading audit dashboard with:

SECTION 1 — EXECUTIVE SUMMARY

- Total trades, total P&L, win rate, average win vs average loss
- Best month, worst month, current streak

SECTION 2 — EQUITY CURVE

- Cumulative P&L over time (chart)
- Rolling 30-day performance
- Drawdown chart

SECTION 3 — STRATEGY ANALYSIS

- Which instruments performed best/worst
- Long vs Short performance split
- Position size vs profitability correlation

SECTION 4 — BEHAVIOURAL FORENSICS

- Performance by time of day (London / NY / Asia session)
- Performance by day of week
- Do larger positions perform worse? (overconfidence check)
- Revenge trading patterns after losses

SECTION 5 — 2026 PROJECTIONS

- Monte Carlo simulation (1000 paths)
- 10th / 50th / 90th percentile outcomes
- What edge do I need to maintain to hit [TARGET P&L]?

SECTION 6 — RECOMMENDATIONS

- Top 3 behavioural leaks to fix
- Optimal position sizing based on my actual edge

Output as a self-contained HTML dashboard. Dark theme preferred.

FOLLOW-UP PROMPTS

- "Zoom into just my XAUUSD trades — same analysis."
- "What would my P&L look like if I had skipped all Friday trades?"
- "Build a position sizing model based on my historical win rate and R:R."

That's a Wrap

Everything in this guide works on the free plan at claude.ai

Start with one prompt. Iterate. Build your own Skills.

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