



POWER OF PORTFOLIO MONITORING THROUGH DASHBOARD

By CA Ghansham Joshi



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- Not SEBI Registered, No Investment Advice/ No Trading Calls
- Do Your Own Research
- Take advice from SEBI Registered Advisor before investing
- Sites used are for information purpose only, no promotion
- **No Stock Specific Query**, I am Not a SEBI Registered Advisor
- Contact / Connect –
 - Twitter - @CaGhanshamJoshi – { GJ's Techno-Funda - Ghansham Joshi }

LEARNING OBJECTIVES

- Power of Portfolio Monitoring through Dashboard
- System Tools
- Q&A – Note down your queries and ask at the end

WHY PORTFOLIO MONITORING?

Entry Price	% Down	CMP	Required Profit to come at Entry Price	Entry Price
100.00	10.00%	90.00	11.11%	100.00
100.00	15.00%	85.00	17.65%	100.00
100.00	20.00%	80.00	25.00%	100.00
100.00	25.00%	75.00	33.33%	100.00
100.00	33.33%	66.67	50.00%	100.00
100.00	42.86%	57.14	75.00%	100.00
100.00	50.00%	50.00	100.00%	100.00
100.00	75.00%	25.00	300.00%	100.00
100.00	80.00%	20.00	400.00%	100.00
100.00	90.00%	10.00	900.00%	100.00



WHY PORTFOLIO MONITORING?



Therefore, it is essential for investors to have a well-defined risk management strategy that can help them mitigate potential losses and maximize returns.

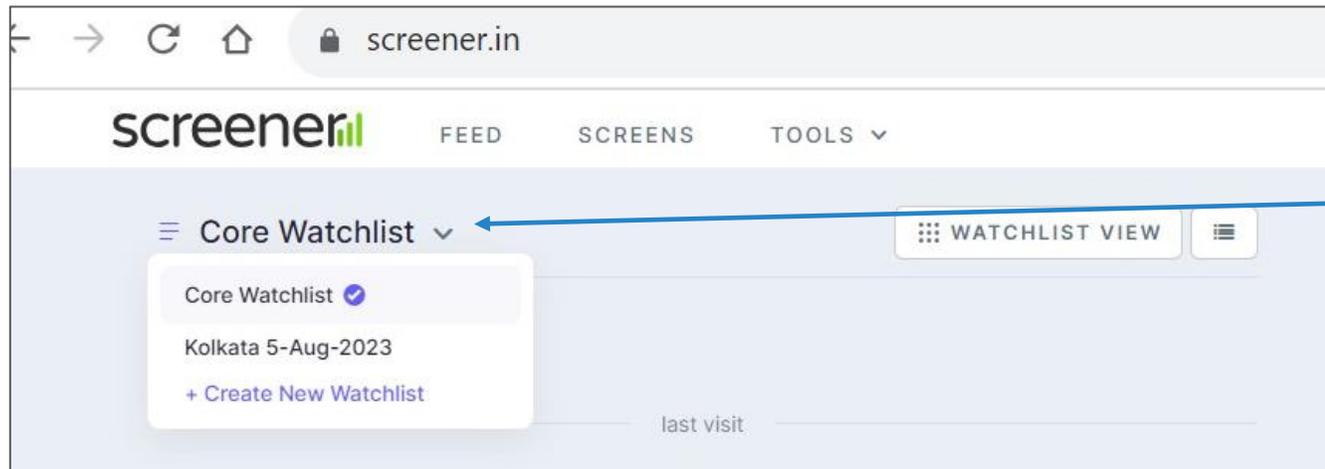
PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A WATCH LIST

- Site Used –
Chartink.com – for technical information;
Screener.in – for Fundamental information
- First Create a “Watch List” of your holding
- Create a Dash Board for Portfolio Management
- Visit the Dash Board at regular intervals – Once in a Week or Daily at around 2:30 PM and take the decision based on your pre-defined strategy.

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A WATCH LIST



The screenshot shows two forms. The first form, titled 'Create new watchlist', has a 'Name' field with 'Kolkata 5-Aug-2023' entered and a 'SAVE' button. The second form, titled 'Add companies to Kolkata 5-Aug-2023', has a 'Company name' field with 'eg. Infosys' entered, a 'DONE' button, and an 'IMPORT COMPANIES' button.

1. Go to Screener.in
2. Register & Create your login
3. Create Core Watchlist –
 1. Either by Entering one by one or
 2. By uploading file.
4. Create mail alert – information regarding company filing etc. will be received on mail.

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A WATCH LIST

Kolkata 5-Aug-2023 / Manage companies / Import

Import companies to Kolkata 5-Aug-2023

* You can undo the imports later.

Import from file

Upload any file which contains ISIN codes.
Or any excel file with a column for BSE or NSE codes.

File
Can be pdf, csv, xls or xlsx

No file chosen

or

Paste company names

Company Names
One name in each line.

eg Infosys
Wipro

Imported 35 companies

Kolkata 5-Aug-2023 / Table View

☰ Kolkata 5-Aug-2023 ▾

S.No. ↑	Name	CMP Rs.	Mar Cap Rs.Cr.	B.V. Rs.	CMP / BV	EV / EBITDA	Graham's Number Rs.	Down %	P/E	Ind PE	FII Hold %	DII Hold %
1.	■ CMS Info Systems	395.40	6104.98	96.94	4.08	11.82	198.53	3.42	21.89	38.30	15.27	20.96
2.	■ Anand Rathi Wea.	1255.55	5234.17	121.14	10.36	20.05	344.09	1.51	28.91	31.96	2.11	9.72
3.	■ Network People	1132.30	731.69	44.31	25.56	37.32	132.67	0.00	64.13	38.30	0.00	9.66
4.	■ Indigo Paints	1579.50	7516.57	163.09	9.68	39.24	318.97	8.80	57.28	61.59	8.90	2.88
5.	■ Angel One	1515.90	12712.08	259.12	5.85	5.86	805.60	16.01	13.68	14.35	17.04	10.25
6.	■ I R C T C	642.75	51420.00	30.98	20.75	35.49	93.62	17.06	52.13	52.13	6.99	9.92
7.	■ Innovana Think.	360.25	738.51	42.01	8.57	18.45	111.38	3.62	27.45	38.30	0.06	0.00
8.	■ Shree Ganesh Rem	429.35	541.56	69.30	6.20	19.43	151.78	9.68	28.64	30.44	0.00	0.00
9.	■ Varun Beverages	800.70	104020.22	39.28	20.39	34.77	106.66	8.34	62.20	43.32	26.71	3.16
10.	■ Raghav Product.	1085.70	1245.98	117.28	9.26	32.68	247.66	7.99	47.98	18.43	0.00	0.00
11.	■ K.P. Energy	360.55	801.50	55.76	6.47	11.17	157.26	9.17	18.29	21.81	0.19	0.00
12.	■ Narayana Hrudaya	1014.90	20740.58	104.29	9.73	20.51	263.85	5.78	34.66	34.93	11.10	11.95
13.	■ WPIL	3015.65	2945.41	829.14	3.64	8.27	1900.85	5.91	15.54	24.62	5.81	2.84
14.	■ West Coast Paper	492.30	3251.64	390.31	1.26	1.98	1119.14	25.85	3.41	15.85	7.38	7.18

PORTFOLIO MONITORING THROUGH DASHBOARD CREATE A WATCH LIST

shreener FEED SCREENS TOOLS ▾

Kolkata 5-Aug-2023 ▾ WATCHLIST VIEW

YESTERDAY

Shree Ganesh Rem [🔗](#)
Announcement under Regulation 30 (LODR)-Newspaper Publication

Triveni Turbine [🔗](#)
Announcement under Regulation 30 (LODR)-Investor Presentation
Copy of Investors' brief & Presentation on the performance of the Company for the Q1 FY24 (consolidated) ended June 30, 2023 for your information.

Shivalik Bimetal [🔗](#)
Announcement under Regulation 30 (LODR)-Investor Presentation
In continuation of our letter dt. July 28, 2023, please find enclosed a presentation on the Un-audited Standalone and Consolidated Financial Results for the quarter ended June 30, ...

Mold-Tek Technol [🔗](#)
Announcement under Regulation 30 (LODR)-Analyst / Investor Meet - Outcome
Audio Recording of Analysts/Investors Conference Call for discussing the Un-Audited Financial Results (Standalone and Consolidated) of the Company for the first quarter ended on 30th June, 2023 and ...

Innovana Think. [🔗](#)
Updates

Triveni Turbine [🔗](#)
Outcome Of The Board Meeting Held On August 1, 2023

Exchange Filings >
Quarterly Results 793 new >
Upcoming Results 7 today >

Upcoming results
Kolkata 5-Aug-2023

Narayana Hrudayalaya Ltd	2 Aug
Neuland Laboratories Ltd	3 Aug
Varun Beverages Ltd	3 Aug
Aptech Ltd	4 Aug
Century Plyboards (India) Ltd	4 Aug
Diamines & Chemicals Ltd	4 Aug
Fineotex Chemical Ltd	4 Aug
Mold-Tek Packaging Ltd	4 Aug
Caplin Point Laboratories Ltd	7 Aug
Indigo Paints Ltd	7 Aug
Stylam Industries Ltd	7 Aug
Indian Railway Catering & Touris...	9 Aug
Ratnamani Metals & Tubes Ltd	9 Aug
West Coast Paper Mills Ltd	10 Aug
Vikram Thermo (India) Ltd	11 Aug

1 / 3 | - 95% + | 📄 🔗

SGRTM
SHREE GANESH REMEDIES LTD.
excelling in chemistry

SHREE GANESH REMEDIES LIMITED
Manufacturer of API Intermediates & Speciality Chemicals

August 01, 2023

To,
BSE Limited
Phiroze Jeejeebhoy Towers,
Dalal Street,
Mumbai - 400001
Scrip Code: 540737

Dear Sir/Ma'am,

Sub: Newspaper Advertisement

Pursuant to Regulation 47 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015, we enclose herewith copies of the newspaper advertisement of the Unaudited Financial Results for the quarter ended on June 30, 2023.

Kindly take the same on your record.

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A WATCH LIST



1. Go to Chartink.com
2. Register Now
3. Create your login

Login

E-Mail Address

Password

Remember Me

[Login](#) [Register Now](#) [Forgot Your Password?](#)



Register

Just takes a minute and its free!

Name

E-Mail Address

Password

Confirm Password

[Register](#)



PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A WATCH LIST

Dashboard
Logout

Scans **Watchlist** Alerts Profile Subscription Custom Indicators ^{*new*}

Alerts can be set to run in over 1,50,000 scans

Watchlist name	Total Stocks	Default watchlist(for scans/widgets)	
Default	0	Yes <input type="checkbox"/>	Edit Add/View Stocks Delete

Create a new Watchlist

1. Edit Name from "EDIT"
2. Make it Default "YES"
3. For Adding Stocks click "ADD"

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A WATCH LIST

Dashboard
Logout

Scans **Watchlist**

Stocks in "Default" watchlist **Upload stocks from txt/csv with symbol or isin:** No file chosen

#	Stock name	Symbol	Change	Close	Remove
	Tata Motors Limited				
	Tata Steel Limited				
	Tata Consultancy Services Lim				
	TATA Consumer Products Ltd				
	Tata Power Company Limited				

1. Type name in "Search" and press "Search"
2. Stock list containing that name will appear
3. Select that desired name and press "Add Selected"
4. Add one by one stock
5. Alternatively – Make a csv file and upload the file by choosing the from Destination Folder

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A WATCH LIST

chartink.com says
Stock added to watchlist

OK

Stocks in "Test Watchlist - Risk Management" watchlist

Upload stocks from txt/csv with symbol or isin: No file chosen

TATA Search

Tata Motors Limited
Tata Steel Limited
Tata Consultancy Services Lim
TATA Consumer Products Ltd
Tata Power Company Limited

> Add selected <

Copy Excel

#	Stock name	Symbol	Change	Close
1	Indiamart Intermesh Ltd	INDIAMART	8.64%	3151

1. Press "OK" on the dialog box
2. That stock will be added in the Watch List

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A WATCH LIST

Stocks in "Test Watchlist - Risk Management" watchlist

Upload stocks from txt/csv with symbol or isin: No file chosen

- Tata Motors Limited
- Tata Steel Limited
- Tata Consultancy Services Lim
- TATA Consumer Products Ltd
- Tata Power Company Limited

1. Remove all Stocks by Empty Watchlist

2. Remove single stock

Search:

#	Stock name	Symbol	Change	Close	Remove
1	Indiamart Intermesh Ltd	INDIAMART	8.64%	3151	Remove
2	MTAR Technologies Ltd	MTARTECH	-1.12%	2113.95	Remove
3	Rail Vikas Nigam Ltd	RVNL	6.18%	136.65	Remove
4	Tanla Solutions Limited	TANLA	13.32%	1266.1	Remove

Showing 1 to 4 of 4 entries

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A DASHBOARD

Chartink India's Finest Technical Tools

Atlas ^{new} **DASHBOARDS**

Screeners Create Scan, Old

Charts Candlestick, P&F

Premium Realtime & Alerts

Dashboard Scans, Watchlists

INK CHART : Candle-Stick

Most inked Charts for today

chartink.com/atlas

Chartink Atlas A Hawk-eye view of the Markets

HOME Analyze, Scans

SCREENERS Create Scan, Old

CHARTS Candlestick, P&F

PREMIUM Realtime & Alerts

DASHBOARD Saved Scans, Watchlist

CONTACT US support@chartink.com

Customize scan result columns, view sector performance, track trends, view multiple scan single view and much more...

[Create a dashboard](#) to begin OR view a top dashboard below

Create Dashboard

Portfolio Monitoring

Is Private? (Premium members can create Private dashboards which are not visible to others)

Chartink Atlas A Hawk-eye view of the Markets

HOME Analyze, Scans

SCREENERS Create Scan, Old

CHARTS Candlestick, P&F

Your Dashboards

Portfolio Monitoring

Has 0 widgets

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A DASHBOARD

Portfolio Monitoring



Auto refresh

Edit layout

Add Scan/Chart

Create a new scan/chart

Start afresh
Create a new scan from scratch

3

OR

- Start from a template**
Templates can be used a starting point for your scans,charts or tables.
- Sector Advances %
 - Stocks near 52 week high
 - Top gainers %
 - Industry Stocks at 52-wk high
 - Average marketcap RSI
 - Marketcap Advances %
 - RSI distribution
 - Stocks above VWAP
 - Todays Volume vs 50 SMA volume
 - Positive vs Negative volumes (in lacs)

Cancel



PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A DASHBOARD

Design a new chart

Design Result

Columns

Filters

Group/Sort

1

Design screen will appear,
Here First Go to Filters

Run Add to current dashboard Cancel

Design a new chart

Design Result

Columns

Filters

Group/Sort

2

Stock passes all of the below filters in **cash** segment:

Change “CASH” to “Watchlist”

Run Add to current dashboard Cancel

Design – Filters – Watchlist

Then go to Columns – and set Columns as per requirement

Design a new chart

Design Result

Columns

Filters

Group/Sort

Stock passes all of the below filters in **watchlist** segment:

Run Add to current dashboard Cancel

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A DASHBOARD

Design a new chart

Columns

Filters

Group/Sort

Design Result

Latest Close as CMP

Latest Sma(Latest Close , 20) as 20 SMA

Bracket(Latest Close - Latest Sma(Latest Close , 20)) / Latest Close * Number 100 as %to20SMA

Latest Sma(Latest Close , 50) as 50 SMA

Bracket(Latest Close - Latest Sma(Latest Close , 50)) / Latest Close * Number 100 as %to50sma

Latest Sma(Latest Close , 200) as 200SMA

Bracket(Latest Close - Latest Sma(Latest Close , 200)) / Latest Close * Number 100 as %to200SMA

Weekly Max(52, Weekly High) as 52WHigh

Weekly Min(52, Weekly Low) as 52WLow

Bracket(Weekly Close - Weekly Min(52, Weekly Low) / Weekly Min(52, Weekly Low) * Number 100 as Recovery from 52 wk low

Bracket(Weekly Max(52, Weekly High) - Weekly Close / Weekly Close) * Number 100 as Away from 52 wk High

Industry as Industry

Run Add to current dashboard Cancel

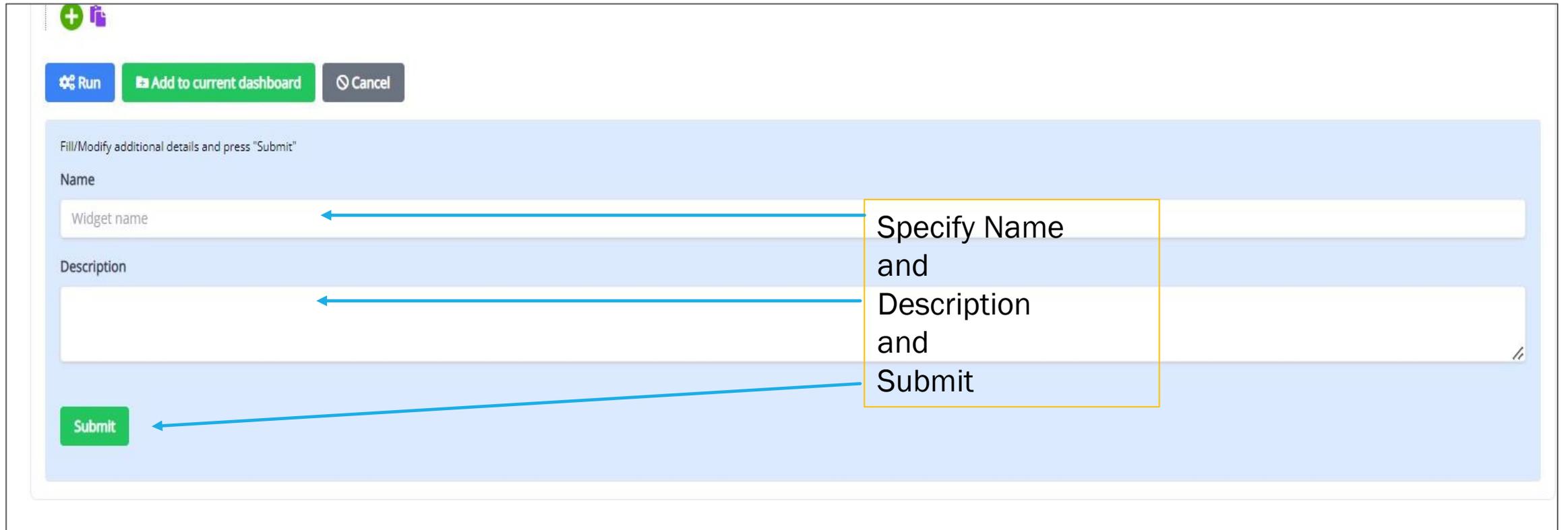
1 After defining the parameters for Column setting, Add to Current dashboard

Ultra Long Term Investor
– instead of Latest use Monthly SMA with Monthly Close for 12 period

One can use various parameters – BB, ST, VWAP etc

PORTFOLIO MONITORING THROUGH DASHBOARD

CREATE A DASHBOARD



The screenshot shows a user interface for creating a dashboard widget. At the top, there are three buttons: 'Run' (blue), 'Add to current dashboard' (green), and 'Cancel' (grey). Below these is a light blue instruction box that says 'Fill/Modify additional details and press "Submit"'. The form contains two input fields: 'Name' with a placeholder 'Widget name' and 'Description'. A green 'Submit' button is located at the bottom left. A yellow box on the right contains the text 'Specify Name and Description and Submit', with blue arrows pointing to the 'Name' field, the 'Description' field, and the 'Submit' button respectively.

Run Add to current dashboard Cancel

Fill/Modify additional details and press "Submit"

Name

Widget name

Description

Submit

Specify Name and Description and Submit

PORTFOLIO MONITORING THROUGH DASHBOARD

“THE” DASHBOARD

Portfolio Monitoring 

Auto refresh Edit layout Add Scan/Chart

Add your first chart/table

Note: Get [Realtime data & auto-refresh](#) for dashboards with [premium subscription](#)

Portfolio Monitoring 

1st Aug, 3:30pm

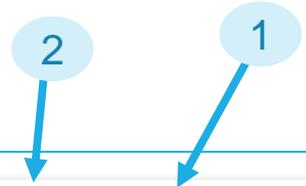
Symbol	Cmp	20 sma	%to20sma	50 sma	%to50sma	200sr
KIRLOSIND	3451	3316.44	3.90	3066.90	11.13	238
VADILALIND	2756.15	2897.52	-5.13	2706.83	1.79	249
HEG	1808.20	1627.76	9.98	1499.12	17.09	115
TATACHEM	1072.90	1003.45	6.47	992.80	7.47	100
TATAMOTORS	643.65	624.84	2.92	584.17	9.24	47
BALRAMCHIN	407.75	389.06	4.58	391.24	4.05	38

Now Your Dashboard is Ready.
To view all the columns –

1. Click on Edit Layout thereafter the Dashboard will turn to Grey and then
2. Drag from the Right Bottom to the maximum extent and then SAVE Layout.

PORTFOLIO MONITORING THROUGH DASHBOARD

“THE” DASHBOARD

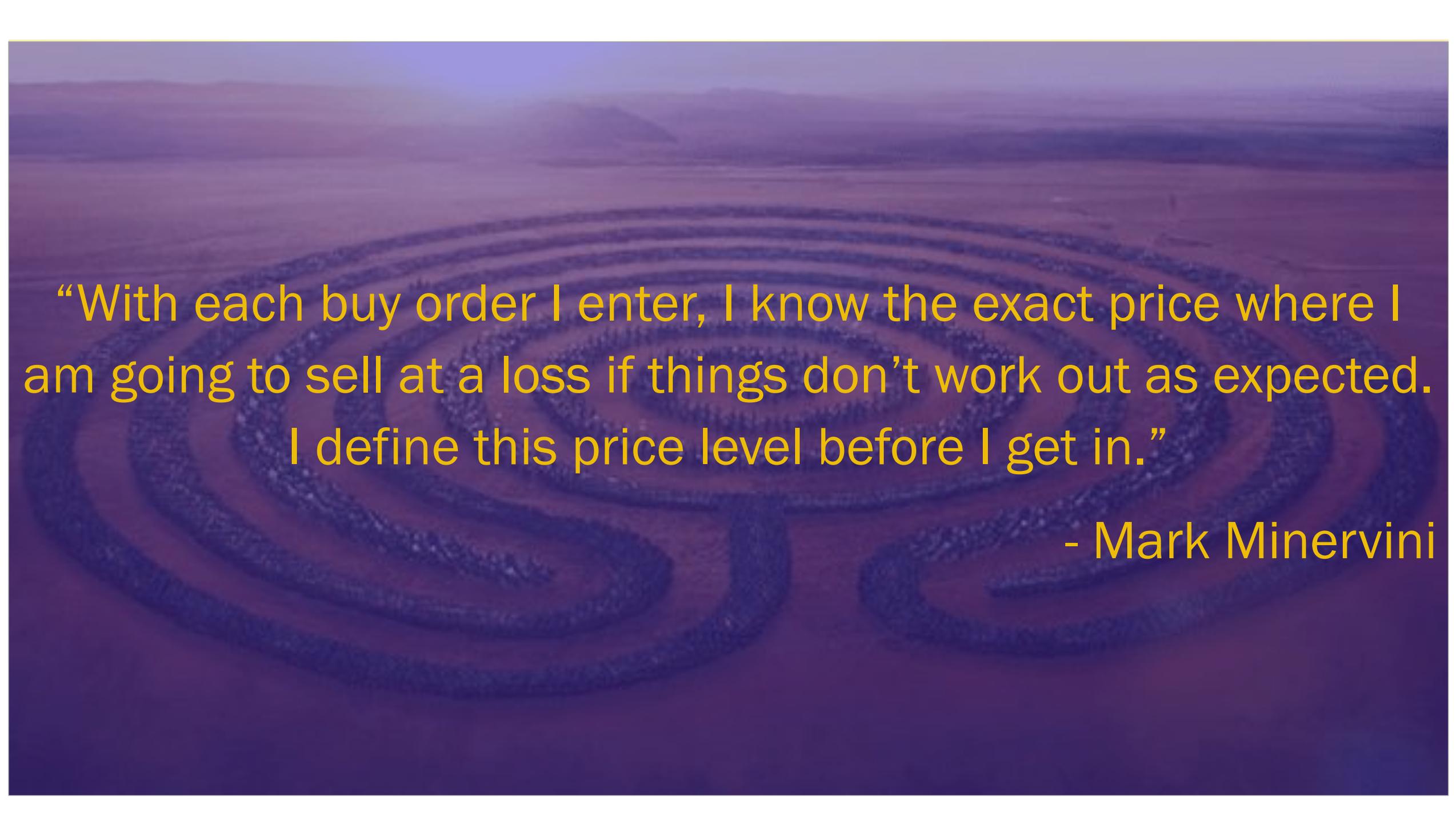


Portfolio Monitoring ⓘ
2nd Aug, 10:17am

Filter Edit Copy Download Delete

Symbol	Cmp	Dailychange	Weekly	Volume	20 sma	%to20sma	50 sma	%to50sma	200sma	%to200sma	52whigh	52wlow	Recovery from 52 wk low	Away from 52 wk high	Vwap	Supertrend	Indust
KIRLOSIND	3541.70	2.63	2.70	2370	3328.87	6.01	3083.22	12.95	2388.80	32.55	3553	1349.60	162.43	0.319	3508.14	3168.57	financ
VADILALIND	2790.30	1.24	-2.35	2437	2900.67	-3.96	2714.79	2.71	2493.09	10.65	3294.65	1798.55	55.14	18.08	2794.36	2582.76	food -
ALKYLAMINE	2451.10	0.496	-0.648	8615	2476.11	-1.02	2545.23	-3.84	2605.75	-6.31	3199	2146.10	14.21	30.51	2456.85	2569.29	chemi
HEG	1779	-1.61	5.52	131122	1636.62	8.00	1511.29	15.05	1160.91	34.74	1844	918	93.79	3.65	1779.07	1605.90	electrc
TATACHEM	1039	-3.16	-1.15	647414	1005.03	3.27	993.95	4.34	1002.62	3.50	1214.90	876.80	18.50	16.93	1042.63	1001.59	chemi
TATAMOTORS	633.90	-1.51	-0.220	2587972	627.12	1.07	586.27	7.51	471.70	25.59	665.40	375.20	68.95	4.97	637.90	610.03	autom
BALRAMCHIN	405.05	-0.662	2.54	359447	390.20	3.67	391.60	3.32	381.59	5.79	430.90	307.30	31.81	6.38	407.72	380.11	sugar
KIRIINDUS	286.25	0.828	0.881	54075	277.43	3.08	283.64	0.911	357.67	-24.95	534.30	255	12.25	86.66	287.61	263.18	dyes a
VEDL	275.55	-0.487	-1.17	1353003	279.09	-1.29	280.55	-1.81	293.30	-6.44	340.75	252	9.35	23.66	275.99	286.48	mining
BLS	242	-0.473	13.86	639629	219.81	9.17	202.27	16.42	180.18	25.54	251.25	110.08	119.84	3.82	241.93	214.82	compu
PRITI	203.20	1.50	1.96	5411	208.96	-2.83	187.68	7.64	165.03	18.78	234.90	127.05	59.94	15.60	201.82	173.59	textile
DELTACORP	199.90	0.832	1.73	1499412	202.49	-1.29	227.13	-13.62	212.40	-6.25	259.95	173.70	15.08	30.04	199.17	215.07	recrea
TATASTEEL	120.50	-2.19	-0.083	11788086	117.40	2.57	113.15	6.10	110.13	8.61	124.30	95	26.84	3.15	120.80	116.23	steel -
BAJAJHIND	16.30	0.308	-10.68	4904659	17.43	-6.92	16.33	-0.196	14.30	12.26	20.20	8.35	95.21	23.93	16.40	19.15	sugar

- You can Download this in CSV format and then analyse further.
- You can Edit/Add/Remove the Columns as per your requirements and including mathematical operations.



“With each buy order I enter, I know the exact price where I am going to sell at a loss if things don’t work out as expected. I define this price level before I get in.”

- Mark Minervini

POWER OF PORTFOLIO MONITORING THROUGH DASHBOARD



Q & A

POWER OF PORTFOLIO MONITORING THROUGH DASHBOARD

GJ's Techno-Funda - Ghansham Joshi



GJ's Techno-Funda - Ghansham Joshi

@CaGhanshamJoshi

Thank You 🙏

See You Soon Again,
Tab tak
Maa Lakshmi Aur Maa
Saraswati ki kripa hum sab
par bani rahe. 🙏