Claude Stock Research System

One-File Setup Guide & Templates

by Miles Deutscher · Full walkthrough on the MDF YouTube channel · Last updated: July 2026

> **What this is:** Drop this file into Claude and say **"set this up"**. Claude will build your entire investing context system — folder, files, and a personal interview to fill them in. Takes ~10 minutes, most of which is you answering questions about how you invest.

How to Use It (Human Instructions)

1. Upload this file to Claude (claude.ai, Claude Desktop, or Cowork)
2. Say: **"Set this up for me"**
3. Answer the interview honestly — the files are only as good as your answers
4. When it's done, follow the connection guide at the bottom to plug in live data

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Instructions for Claude (Execute When User Asks to Set This Up)

You are setting up a personal investing context system for this user. Follow these steps exactly:

Step 1 — Detect your environment, then create the folder.

- If you have access to the user's file system (Claude Desktop / Cowork / Claude Code): create a folder called `investing-context` in their working directory or another location they approve.
- If you're in a sandboxed environment (claude.ai with code execution): create the folder there, and at the end zip it and give the user a download link.
- If you have no code execution at all: create each file's content in your response so the user can copy them, and tell them the ideal home is a Claude Project.

Step 2 — Create these 5 files using the templates below. Copy the templates exactly, then fill them via the interview.

Step 3 — Interview the user to fill `investor-profile.md` and `strategy.md`. Rules:

- ONE question at a time. Never present a form or a list of questions.
- Conversational, direct, no corporate tone.
- If an answer is vague ("medium risk I guess"), push back once: ask for a concrete example, e.g. "If a position dropped 30% in a month, what would you actually do?"

- 5–7 questions for the profile, 4–6 for strategy. Don't over-interview.
- If the user wants to stop mid-interview, save what you have, mark unanswered fields as `TODO`, and tell them they can resume anytime by re-uploading the folder and saying "finish my setup".
- Write their answers into the files as clean, structured markdown — third person is fine — dense enough that a future AI conversation can use it as context without the user re-explaining anything.

Step 4 — Portfolio and watchlist. Ask the user if they want to paste their current holdings and watchlist now. If yes, populate `portfolio.csv` and `watchlist.md`. If no, leave the templates with example rows and remind them to fill these in — the Morning Loop prompt depends on them.

Step 5 — Verify and finish cleanly.

- If the user has the FMP connector available, run a live test now: pull the current price and P/E of one of their holdings and confirm the data came from the connector. If FMP isn't connected, point them to the connection guide below before anything else.
- Tell the user where the folder lives (or give the zip download).
- Recommended setup: create a Claude Project called **"Stock Research"** (or, if Projects aren't available on their plan, keep one dedicated chat), upload all 5 files to it, and paste the contents of `investor-profile.md` + `strategy.md` into the Project instructions.
- Their first message tomorrow morning: the Morning Loop prompt from `prompts.md`.
- Last tip for them: every quarter, open the Project and say "review my profile and strategy with me" — a stale profile quietly degrades every answer.

Do NOT skip the interview. Do NOT fill the profile with placeholder guesses. Do NOT provide investment advice during setup — you are building context, not making recommendations.

File Templates

1. investor-profile.md

```
# Investor Profile

## Background
- Experience level:
- Years investing:
- Relevant background (finance, tech, none):

## Goals
- Primary goal (wealth building / income / speculation / learning):
- Time horizon:
- Target outcome:

## Risk
- Risk tolerance (with a concrete example of behaviour in a drawdown):
- Max acceptable position drawdown before acting:
- Portfolio size bracket (small / mid / large — no exact figures needed):

## Constraints
- Time available for research per week:
- Tax situation notes (optional):
- Anything off-limits:
```

2. strategy.md

```
# Investing Strategy

## Style
- Approach (long-term compounding / swing / narrative-driven / income / hybrid):
- Typical holding period:

## Position Rules
- Position sizing rule (e.g. max % per position):
- Max positions held at once:
- When I add to a position:
- When I trim or exit:

## Focus
- Sectors / assets I focus on:
- What I deliberately avoid:
- Edge I believe I have (be honest):

## Discipline
- Profit-taking rule:
- Stop-loss / drawdown rule:
- Mistakes I've made before that Claude should call out if I repeat them:
```

3. portfolio.csv

```
ticker,name,type,weight_pct,avg_entry,notes
NVDA,NVIDIA,equity,10,450.00,example row - replace with your holdings
```

4. watchlist.md

```
# Watchlist

| Ticker | Why I'm watching | What would make me buy |
|--------|------------------|------------------------|
| EXAMPLE | replace me | replace me |
```

5. prompts.md

```
# Research Prompt Library

## 1 — The Snapshot
Give me a full snapshot of $TICKER: current price and how it's moved this month, valuation
vs its 5-year averages, last quarter's results vs analyst estimates, current analyst price
targets, and any red flags in recent filings.

## 2 — The Filings Digest
Pull the latest earnings report and recent SEC filings for $TICKER. Summarise what
actually changed this quarter — revenue drivers, margins, guidance — and flag anything
management seems to be downplaying or burying.

## 3 — The Head-to-Head
Compare $A vs $B on valuation, revenue growth, margins, debt, and analyst sentiment. Build
me a comparison table, then tell me which one the data favors and make the strongest case
for it.

## 4 — The Finder
Screen the market for small caps under $2B with revenue growth above 25%, positive free
cash flow, and expanding margins. Cross-check against analyst coverage and flag the 3–5
trading furthest below price targets — give me the bull case and the biggest risk for
each.
(Note: starting points for your own diligence, not picks — small caps are illiquid.)

## 5 — The Morning Loop (run inside your Stock Research Project — it needs your profile,
portfolio, and watchlist as context)
Run my morning loop: overnight moves in the major indexes, pre-market gainers and losers,
today's earnings and economic calendar, latest news on my watchlist — then check it all
against my portfolio and investor profile: flag anything that hits my holdings, upcoming
earnings dates I need to watch, and the one thing that most needs my attention today.

## Trust rule (applies to every prompt)
If Claude gives numbers without calling the FMP connector, they may be from memory. Ask:
"Cite where each figure came from." If it can't, don't trust it.
```

Connection Guide (Do this once, after setup)

FMP — The Live Market Data

1. Claude → Settings → Connectors → search **FMP** (Financial Modeling Prep) → Connect
2. FMP is a paid service — pricing scales with usage and data depth. Start on the lowest tier (~$22/mo) and only upgrade when a prompt actually hits a data wall. Check current plans at their pricing page.
3. Test it: *"What's the current price and P/E of $AAPL?"* — numbers back = you're live

Google Sheets — Your Portfolio, Live (Optional but recommended)

1. Move your portfolio into a Google Sheet (same columns as `portfolio.csv`)
2. Claude → Settings → Connectors → connect **Google Drive**
3. Test it: *"Read my portfolio sheet and list my holdings"*
4. Now the Morning Loop reads your real positions — never attach a file again

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Research tool, not financial advice — Claude informs the decision, you make it.
Free from the Telegram — full video walkthrough on the Miles Deutscher Finance YouTube channel.