

BETTERINVESTING
 Rocky Mountain Chapter

Mastering Stock Research with AI



Presented by

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Introduction to NotebookLM

- NotebookLM is an AI-powered research assistant developed by Google.
- It lets users upload documents and interact with them using AI.
- It generates summaries, answers questions, and creates study materials from your sources.
- Its responses are grounded in your uploaded content, helping improve accuracy.

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How to use NotebookLM

- NotebookLM is Google's AI tool that lets you upload documents and ask questions about them in plain English.
- Upload financial statements, earnings reports, and analyst notes—then instantly extract insights across all documents.
- Ask questions like "How have margins trended?" or "What risks does management keep mentioning?" to uncover what's not obvious.
- Get answers in seconds instead of spending hours manually reading through reports and taking notes.

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Questions to ask NotebookLM

Financial performance & trends

- What has been the revenue growth trend over the past 10 years? Are there any significant acceleration or deceleration periods?
- How have profit margins (gross, operating and net) changed over time? What explains any major shifts?
- Compare the company's performance during the last recession versus recent years. How resilient is the business?
- What were the best and worst performing years? What drove those results?

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Questions to ask NotebookLM


Cash flow and capital allocation:

- How much free cash flow has the company generated over the past decade? Is it growing consistently?
- What has the company done with its cash – buybacks, dividends, acquisitions or debt reduction?
- Has the company been consistently cash flow positive? Any concerning quarters?
- What's the trend in capital expenditures as a percentage of revenue?

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Questions to ask NotebookLM




Operational insights:

- Are there any recurring issues or risks that management mentions across multiple years?
- How have key metrics (customer count, average revenue per user, retention rates) evolved?
- What major investments or strategic initiatives has the company made? Did they pay off
- Are there any one-time charges or restructuring costs that keep appearing?


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Questions to ask NotebookLM



Forward-looking:

- What guidance or projections has management provided? How accurate have they been historically?
- Based on historical patterns, what should investors watch out for in the upcoming quarters
- What trends from the past 10 years are likely to continue versus reverse?

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