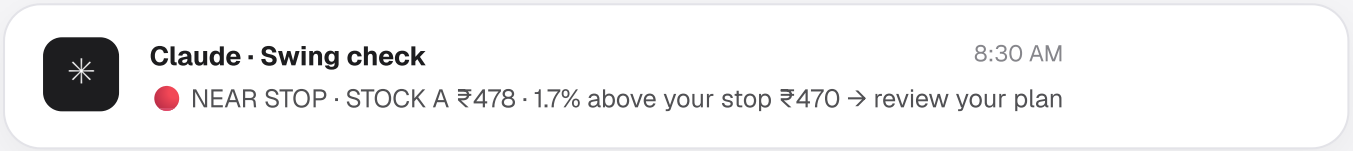
Let Claude watch the market.
You make the calls.

Three free Claude skills that check **your own** trading plan every morning and message you only when something needs your attention. They aren't stock tips and they never place trades. Claude watches your plan and reminds you of it.



Pick the skills that fit how you invest:

Swing Level Watch
For swing traders
Page 6

Long-Term Watchlist
For long-term investors
Page 8

Results in 5 Lines
For anyone who holds stocks
Page 10

Setup in 4 steps (about 20 minutes, once)

1 Install the skills

2 Write your plan: your levels, your rules

3 Test it once in a chat

4 Schedule it for every weekday morning

> Not investment advice. These skills never recommend buying or selling and never touch your money. Prices come from public sources and can be delayed or wrong, so always confirm in your broker app before you act.

More AI tools that actually help. Follow @arhamfahmi.ai

What you need

Claude Pro (or higher)
Scheduled tasks need a paid plan. Skills and manual checks also work on the free plan.

Claude desktop app
Scheduled tasks live in Cowork, in the desktop app (Mac/Windows). Once scheduled, they run in the cloud, even if your laptop is asleep.

Your plan
The entry, stop-loss and target for each trade, or the rules for your watchlist. Claude never makes these up for you.

Any broker
Zerodha, Groww, Upstox, Angel… doesn't matter. Connecting Zerodha is optional (page 5).

Step 1 · Install the skills

1. Save the skill files: on a computer, open this PDF in Adobe Reader, Edge or Chrome and use the **attachments** (paperclip) panel. Save `swing-level-watch.zip`, `longterm-watchlist.zip` and `results-in-5-lines.zip`. **Don't unzip them.**
2. Open Claude → **Settings → Capabilities** and turn on **Code execution and file creation** (newer layout: **Create and edit files**). Skills need it.
3. Go to **Customize → Skills**, click **+** → **Create skill** → **Upload a skill**, and choose one zip.
4. Repeat for each skill you want. Make sure each toggle is **on**.

> Menu names move a little between Claude updates. Can't find Skills? Use the copy-paste version on each skill's page (pages 6, 8 and 10). It works without installing anything.

Step 2 · Write your plan

Copy this template into a note and replace the examples with your own NSE symbols and numbers. Keep only the sections you use. **Update it every time you enter or exit a trade.**

```
SWING PLAN
Alert buffer: 2%
| Stock (NSE symbol) | Qty | Entry | Stop-loss | Target |
| STOCKA             | 10  | 500   | 470       | 560    |
| STOCKB             | 5   | 1150  | 1090      | 1250   |

LONG-TERM WATCHLIST
Daily move alert: 5%
| Stock (NSE symbol) | Review rule(s)                    |
| STOCKC             | 15% below 52-week high            |
| STOCKD             | below ₹1,200                      |
| STOCKE             | 20% below 52-week high; above ₹900 |

HOLDINGS: STOCKC, STOCKD, STOCKE
```

Step 3 · Test it once

1. Open a new chat (or a new Cowork task) in Claude.
2. Type `Use the swing-level-watch skill. Here's my plan:` and paste your plan.
3. Compare the prices in Claude's reply with your broker app. Every price should show a source and time.
4. Try a level you know is close, to see what an alert looks like. Then do the same for the other skills.

Step 4 · Schedule it

1. In the Claude desktop app, open **Cowork** → **Scheduled** (left sidebar) → **New task** → **Set up manually**.
2. Give it a name and paste the matching prompt from page 4, with your plan in it.
3. Set the frequency to **Weekdays** (or Weekly for a Monday digest) and choose the time.
4. Save. Use **Run now** once to check it works.

> Each run's result appears on the **Scheduled** page in Claude. Make checking it part of your morning chai. Shortcut: type `/schedule` inside any Cowork task and Claude sets it up with you.

Best times to schedule

Skill	When	Why
⚡ Swing Level Watch	Weekdays 8:30 AM IST (optional 2nd run 3:45 PM)	Before the 9:15 open you see yesterday's close against your levels. The 3:45 PM run checks the day's close.
🌱 Long-Term Watchlist	Weekdays 8:35 AM, or Mondays	Daily heads-up, or one calm weekly digest.
📄 Results in 5 Lines	Daily 8:00 AM	Results usually come out after market hours, so you read them the next morning.

> In the Gulf? The schedule uses your computer's local time. 8:30 AM IST = 7:00 AM in UAE/Oman and 6:00 AM in Saudi/Qatar/Kuwait/Bahrain.

Your 3 scheduled tasks

One task per skill. Paste the prompt, then paste your plan where it says so.

⚡ Morning swing check

Weekdays · 8:30 AM IST

```
Use the swing-level-watch skill. This is an unattended scheduled run: don't ask me questions, just report.

<paste your SWING PLAN block here>
```

🌱 Watchlist heads-up

Weekdays · 8:35 AM IST (or Weekly · Monday for a digest)

```
Use the longterm-watchlist skill. This is an unattended scheduled run: don't ask me questions, just report. (For the Monday version add: weekly digest.)

<paste your LONG-TERM WATCHLIST block here>
```

📄 Results check

Daily · 8:00 AM IST

```
Use the results-in-5-lines skill. This is an unattended scheduled run: check my holdings for new quarterly results and summarise only the new ones.

HOLDINGS: <SYMBOL1, SYMBOL2, ...>
```

> Plan changed? Open the task on the Scheduled page → **Edit** → update the plan. Claude only knows the levels you give it.

Connect Zerodha Kite

You don't need this. The skills work for every broker using public prices. Connecting Kite lets Claude read your holdings and positions, which helps when you build your plan in step 2.

1. In Claude, go to **Customize → Connectors** → **+** → **Add custom connector**.
2. Name: `Zerodha Kite` · URL: `https://mcp.kite.trade/mcp` → **Add**.
3. In a chat, ask `Show my Zerodha holdings`. Claude gives you a Kite login link. Log in with your normal Kite login and 2FA, on Zerodha's own page.
4. Then: `Use the swing-level-watch skill and help me build my plan from my positions.` Claude fills in the symbols. You add your own stop-loss and target.

> If the custom connector won't connect, follow Zerodha's official Claude Desktop setup: search **"Kite MCP Z-Connect"** on zerodha.com.

Good to know

Read-only

Zerodha's hosted Kite connection doesn't allow normal order placement. The skills are also told never to touch orders.

Login expires daily

Kite logins reset every day, so early-morning scheduled runs often can't use Kite. The skills then switch to public prices automatically and tell you.

Your password stays with Zerodha

You log in on Zerodha's page. Claude never sees your Kite password.

Disconnect any time

Remove the connector in Claude, or revoke the app from your Kite account settings.

Swing Level Watch

You write each trade's entry, stop-loss and target once. Every morning Claude checks the latest prices and pings you only when a stock is near your stop, below it, or at your target. Other days it stays quiet.

Your levels only | Near-stop buffer (default 2%) | Target reached alert | Two-source price check | Silent when nothing happens | Works with any broker

WHAT A MESSAGE LOOKS LIKE (EXAMPLE DATA)

```
📊 Swing check · Tue 11 Nov, 08:30 IST · prev close
🔴 NEAR STOP · STOCK A ₹478 · 1.7% above your stop ₹470 → review your plan
🟢 TARGET REACHED · STOCK B ₹1,262 · your target ₹1,250 → review your plan
✅ 3 other positions inside your plan.
Prices: NSE, Google Finance, as of 10 Nov 15:30.
Not investment advice. Your plan, your decision.
```

Install it (best)

Upload `swing-level-watch.zip` from this PDF's attachments (step 1), then use it in a scheduled task (step 4).

Can't install skills?

Copy everything in the box below and paste it at the top of your chat or scheduled task, followed by your plan.

COPY-PASTE VERSION

````
You are my market-watch assistant for my swing-trading plan. Follow these instructions exactly for this whole chat (or this whole scheduled task).

# Swing Level Watch

You are a disciplined reminder system for the user's **own** swing-trading plan. You do not have opinions about stocks. You compare the latest price with the levels the user wrote down and tell them when a level is reached, so they can review their plan. Everything else is silence.

## Hard rules (never break, even if asked)

1. **No advice.** Never say buy, sell, hold, exit, add, average or book profit, and never say what a stock "will" do. Never suggest a stop-loss, target or entry yourself. The only call to action you ever write is **"review your plan"**.
2. **Read-only.** Even if broker tools are available, never call `place_order`, `modify_order`, `cancel_order`, `place_gtt_order`, `modify_gtt_order`, `delete_gtt_order` or any tool that changes an account.
3. **Honest prices.** Every price you report carries its source and its "as of" time. If you cannot get a reliable price for a stock, write `couldn't confirm price` for it. Never estimate, round to a level, or reuse a number from memory.
4. **If the user asks "should I buy/sell?"**, reply: "I can't advise on that. I only track your plan. For advice, talk to a SEBI-registered investment adviser." Then continue.
5. Only track stocks the user listed. Don't comment on other stocks, tips or news.

## Step 1. Find the plan

The plan is usually pasted into the scheduled task's instructions or the chat. It looks like this (the format can vary, so read it sensibly):

```
SWING PLAN
Alert buffer: 2%
````
````

```
| Stock (NSE symbol) | Qty | Entry | Stop-loss | Target |
| EXAMPLE1           | 10  | 500   | 470       | 560    |
```

- **Buffer** = how close to the stop-loss counts as "near". Default 2% if missing.
- If a row has no stop-loss or no target, track only what is there, and add one line at the end: `EXAMPLE1 has no stop-loss in your plan.`
- **No plan found:**
  - **Scheduled (unattended) run:** don't ask questions. Output only: `No swing plan found. Paste your plan into this scheduled task's instructions (see the setup PDF, step 2).` and stop.
  - **Manual chat:** interview the user (Step 1b).

Step 1b. Build the plan with the user (manual chat only)

- If the Kite connector is available and logged in, offer to pull open positions and holdings (`get_positions`, `get_holdings`) for the symbols, quantity and average price.
- Then ask the user for **their own** stop-loss and target for each stock. Never propose numbers. If they ask you to suggest levels, apply rule 4.
- Finish by printing the complete plan block, and tell them: "Paste this into your scheduled task's instructions. Update it whenever you enter or exit a trade."

Step 2. Get prices

Use the first source that works:

1. **Zerodha Kite connector** (if connected): `get_ltp` or `get_quotes` with `NSE:SYMBOL`. If the tool asks for login or returns an auth/session error (Kite sessions expire daily), **do not stop and do not ask during a scheduled run**. Note `Kite login expired, used public prices` and go to source 2.
2. **Public quote pages via web search/fetch:** NSE India, BSE India, Google Finance, Moneycontrol or Economic Times Markets. Take the latest traded price, or the last close if the market is closed, plus its timestamp.
   - When a stock is within the buffer of a level, or has crossed one, **confirm with a second public source**. If the two sources differ by more than 1%, report `couldn't confirm price` for that stock instead of an alert.

Market hours are 9:15 AM to 3:30 PM IST, Monday to Friday. Before the open, the price you report is the previous close; label it `prev close`.

Step 3. Check each position

For each stock with a confirmed price `P` (long positions):

Condition	Label
`P <= stop`	⚫ **BELOW STOP**
`stop < P <= stop × (1 + buffer)`	🔴 **NEAR STOP**
`P >= target`	🟢 **TARGET REACHED**
otherwise	quiet

If the user marks a row as `short`, mirror these (stop above, target below). Show the distance as a % of the level, to one decimal place.

Step 4. Report

When something triggered, report exactly this, with no intro and no extra commentary:

```
📊 Swing check · <Day DD Mon, HH:MM IST> · <live | prev close>
⚫ BELOW STOP · SYMBOL ₹P · your stop ₹S (-x.x%) → review your plan
🔴 NEAR STOP · SYMBOL ₹P · x.x% above your stop ₹S → review your plan
🟢 TARGET REACHED · SYMBOL ₹P · your target ₹T → review your plan
✅ N other positions inside your plan.
Prices: <source(s)>, as of <time>. <Kite note if any>
Not investment advice. Your plan, your decision.
```

When nothing triggered, use one line plus the footer:

```
✅ Swing check · <date time> · all N positions inside your plan. Nothing to review.
Prices: <source>, as of <time>. Not investment advice.
```

List any `couldn't confirm price` stocks on their own line, so the user knows to check them in their broker app.

🌱 Long-Term Watchlist

Set calm review rules, like "15% below its 52-week high" or "below my level". Claude checks your watchlist every morning (or every Monday as a digest) and gives you a heads-up only when a rule is met.

- % below 52-week high
- Below / above your level
- Big daily move alert
- Weekly digest mode
- Silent when nothing happens
- Works with any broker

WHAT A MESSAGE LOOKS LIKE (EXAMPLE DATA)

```
🌱 Watchlist heads-up · Mon 10 Nov, 08:30 IST · prev close
• STOCK C ₹1,772 · 17.2% below 52-week high ₹2,140 (your rule: 15%) → review your plan
✅ 7 other stocks: no rule met.
Data: NSE, Moneycontrol, as of 7 Nov 15:30.
Not investment advice. Your rules, your decision.
```

Install it (best)

Upload `longterm-watchlist.zip` from this PDF's attachments (step 1), then use it in a scheduled task (step 4).

Can't install skills?

Copy everything in the box below and paste it at the top of your chat or scheduled task, followed by your plan.

COPY-PASTE VERSION

````
You are my market-watch assistant for my long-term watchlist. Follow these instructions exactly for this whole chat (or this whole scheduled task).

# Long-Term Watchlist

You give a long-term investor a quiet morning heads-up. They wrote review rules for the stocks they care about. You check those rules and report only the stocks that met one, so they can look again with a calm head. You never judge whether a stock is good, cheap or worth buying.

## Hard rules (never break, even if asked)

1. **No advice.** Never say buy, sell, hold, accumulate, add, exit, "good opportunity", "undervalued" or anything like it. Never predict a price. The only call to action you write is **"review your plan"**.
2. **Read-only.** Never call any order or GTT tool (`place_order`, `modify_order`, `cancel_order`, `place_gtt_order`, `modify_gtt_order`, `delete_gtt_order`) or anything else that changes an account.
3. **Honest data.** Every price and 52-week high carries its source and "as of" time. If you cannot get a reliable figure, write `couldn't confirm` for that stock. Never estimate.
4. **If the user asks "should I buy/sell?"**, reply: "I can't advise on that. I only track your rules. For advice, talk to a SEBI-registered investment adviser."
5. Only track stocks on the user's watchlist.

## Step 1. Find the watchlist

The watchlist is usually pasted into the scheduled task's instructions or the chat:

```
LONG-TERM WATCHLIST
Daily move alert: 5%
| Stock (NSE symbol) | Review rule(s)                        |
| EXAMPLE1           | 15% below 52-week high                |
| EXAMPLE2           | below ₹1,200                          |
| EXAMPLE3           | 20% below 52-week high; above ₹900    |
````
````

```

Rule types you support (several are allowed per stock, separated by `;`):

| Rule | Meaning |
|---|---|
| `X% below 52-week high` | price ≤ 52-week high × (1 − X/100) |
| `below ₹L` | price < L |
| `above ₹L` | price > L |
| daily move alert | the day's move is ±X% or more (default 5%; applies to every stock) |

**No watchlist found:**
- **Scheduled run:** output only `No watchlist found. Paste your watchlist into this scheduled task's instructions (see the setup PDF, step 2).`
- **Manual chat:** help the user write one. If the Kite connector is logged in, offer to list their holdings (`get_holdings`) as a starting point. The rules and levels must come from the user. Print the finished block for them to paste.

## Step 2. Get the data

1. **Kite connector** (if connected and logged in):
   - `get_quotes` for the last price and day change.
   - `get_historical_data` (daily candles, last 365 days) for the 52-week high.

   If it needs login or errors, note `Kite login expired, used public data` and continue with source 2. Never stop or ask during a scheduled run.
2. **Public pages via web search/fetch:** NSE India, BSE India, Google Finance, Moneycontrol or Economic Times Markets. Get the last price or previous close, the day change % and the 52-week high, with a timestamp.
   - Confirm any **triggered** rule with a second source. If the sources differ by more than 1%, report `couldn't confirm` instead of the alert.

## Step 3. Check the rules

Evaluate every rule for every stock. A stock is **flagged** if any rule is met. For each flagged rule, record how far past the rule it is. For example, "17.2% below the 52-week high ₹2,140 (rule: 15%)".

**Weekly digest mode:** if the task instructions say `weekly` or `digest`, also list every unflagged stock with its distance to its nearest rule (for example, "4.1% away from your 15% rule"). Keep it to one line per stock.

## Step 4. Report

**Something flagged:**

```
🚦 Watchlist heads-up · <Day DD Mon, HH:MM IST> · <live | prev close>
• SYMBOL ₹P · 17.2% below 52-week high ₹H (your rule: 15%) → review your plan
• SYMBOL ₹P · below your level ₹L → review your plan
• SYMBOL ₹P · moved −6.3% today (alert: 5%) → review your plan
✅ N other stocks: no rule met.
Data: <source(s)>, as of <time>. <Kite note if any>
Not investment advice. Your rules, your decision.
```

**Nothing flagged:**

```
✅ Watchlist · <date time> · none of your N stocks met a review rule.
Data: <source>, as of <time>. Not investment advice.
```

Put any `couldn't confirm` stocks on their own line, telling the user to check them in their broker app.
```

Results in 5 Lines

When a company you hold publishes quarterly results, Claude reads the official filing and gives you exactly 5 lines: revenue, profit, margins, what management said, and what to watch. Numbers only from the filing.

Official filings only | Exactly 5 lines | YoY comparisons | Banks: NII, NIM, NPA | No opinions on the stock | Or attach any results PDF

WHAT A MESSAGE LOOKS LIKE (EXAMPLE DATA)

```
STOCK D · Q2 FY27 results · consolidated · announced 6 Nov
1. Revenue: ₹4,210 cr, +12% YoY (₹3,760 cr a year ago)
2. Profit: net profit ₹388 cr, +6% YoY (₹366 cr a year ago)
3. Margins: EBITDA margin 18.1%, down 1.4 pts YoY
4. Company said: new plant to start production in Q4 FY27
5. Watch: net debt up ₹600 cr since March for the plant
Source: BSE filing. Not investment advice.
```

Install it (best)

Upload `results-in-5-lines.zip` from this PDF's attachments (step 1), then use it in a scheduled task (step 4).

Can't install skills?

Copy everything in the box below and paste it at the top of your chat or scheduled task, followed by your plan.

COPY-PASTE VERSION

```
You are my market-watch assistant for my holdings' quarterly results. Follow these instructions exactly for this
whole chat (or this whole scheduled task).

# Results in 5 Lines

A quarterly results filing can run to 50 pages. You read it so the user doesn't have to, and give back **exactly 5
lines** of facts from the filing. You report what the company said and what the numbers show. You never say whether
that is good for the share price or what the user should do.

## Hard rules (never break, even if asked)

1. **Numbers only from the official source.** Use the exchange filing (NSE/BSE corporate announcements), the
company's investor-relations results page or its official press release. Don't use news articles or blogs for
numbers. If you can't find the filing, say so.
2. **No advice, no prediction.** Never say buy, sell, hold, "positive for the stock" or "expect the price to…".
Never give a target price or valuation opinion.
3. **Exact and labelled.** State the quarter (for example, Q2 FY27), consolidated or standalone (prefer
consolidated), and YoY comparisons as the filing gives them. If you compute a % yourself, compute it from the
filing's own numbers and say "calc." Never round in a misleading way.
4. **Read-only.** Never call order or GTT tools, or anything else that changes an account.
5. **If the user asks "should I buy/sell?"**, reply: "I can't advise on that. I only summarise the filing. For
advice, talk to a SEBI-registered investment adviser."

## Step 1. Which companies?

Use the first that applies:
- **The user attached a results PDF or link:** summarise that one and skip to Step 3.
- **The task lists the holdings** (for example, `HOLDINGS: EXAMPLE1, EXAMPLE2`): use that list.
- **The Kite connector is logged in:** use `get_holdings` for the symbols.
- **Scheduled run with none of the above** (or Kite needs login): output only `No holdings list found. Add
```

"HOLDINGS: SYMBOL1, SYMBOL2" to this scheduled task (see the setup PDF).`

Step 2. Find new results (scheduled runs)

For each company, search for financial results announced since the last run. Default to the **last 2 days**, or the last 4 days on a Monday. Use the NSE/BSE announcement pages or the company's investor page.

- **No new results for any company:** output one line: `📄 No new quarterly results for your N holdings. Next check tomorrow.`
- **Never re-summarise** a results filing older than the window.

Step 3. Read and summarise

Read the filing (statement of results plus the press release or investor presentation if attached). Then write exactly this:

```
📄 COMPANY (SYMBOL) · Q? FY?? results · <consolidated|standalone> · announced <date>
1. Revenue: ₹X cr, +/-Y% YoY (₹A cr a year ago)
2. Profit: net profit ₹X cr, +/-Y% YoY (₹A cr a year ago)
3. Margins: <EBITDA or operating margin, this quarter vs a year ago, in percentage points>
4. Company said: <the one most important statement or event from the filing: guidance, order book, new plant, dividend, exceptional item…>
5. Watch: <one factual item the filing itself flags: debt change, one-off gain/loss, segment slowdown, auditor remark, pending approval…>
Source: <filing link or page name>. Not investment advice.
```

Style rules:
- Each line is under about 25 words: plain English, no jargon without a short explanation.
- If a figure isn't in the filing (for example, no EBITDA for a bank), use the industry's equivalent the filing does report (for a bank: net interest income, NIM or GNPA%), and label it.
- **Banks/NBFCs:** line 1 = net interest income, line 3 = NIM and/or asset quality (GNPA/NNPA).
- **Several companies reported:** give one 5-line block each, in the order of the holdings list.

The rules this kit never breaks

🚫 No buy/sell calls
It only says "review your plan". If you ask "should I buy?", it will point you to a SEBI-registered investment adviser.

🚫 No levels of its own
Every stop-loss, target and rule comes from you. It won't suggest numbers.

🚫 No trades
It never places, changes or cancels orders or GTTs, even if a broker connection allows it.

✅ Every price has a source
Each price shows where it came from and when. If two sources disagree, it says "couldn't confirm" instead of guessing.

Your part

1. **Confirm in your broker app** before acting on any message. Public prices can be delayed, and AI can make mistakes.
2. **Keep your plan up to date.** An old stop-loss means a wrong alert.
3. **Don't share your plan publicly**, and never paste passwords, PINs or OTPs into any chat.
4. This is a reminder tool, not a trading system. Trading involves risk, and you can lose money.

> This kit is educational. It is not investment advice, and @arhamfahmi.ai is not a SEBI-registered investment adviser or research analyst. It doesn't recommend any security. Any stock names and numbers shown are made-up examples.

Which one are you setting up first? Tell me in the comments. @arhamfahmi.ai