



Strategic Investments: Finance Analysis Mastery

10 – 14 May 2027
San Diego



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Course Overview:

The Strategic Finance and Investment Analysis Training Program is specifically designed for professionals working in or aspiring to a Financial and Investment Analysis role. This advanced Finance and Investment Analysis Course develops the analytical, modeling, valuation, and portfolio management capabilities required to perform effectively in strategic finance positions.

Unlike general finance programs, this course focuses directly on the day-to-day responsibilities of a Financial and Investment Analyst — including financial statement diagnostics, capital budgeting, valuation modeling, risk assessment, portfolio construction, and investment decision reporting. It integrates structured Investment Analysis Training, Financial Modeling and Investment Analysis, and Financial Risk and Portfolio Management Training into one comprehensive framework.

Participants will master Financial Statement Analysis Course methodologies, execute capital investment appraisals through a structured Capital Budgeting and Valuation Course approach, and apply portfolio optimization techniques used in Portfolio Management Training environments. The program is also aligned with professional growth pathways such as Financial Analysis Certification and Investment Analysis Certification, making it suitable as an Executive Program in Finance and Investment Analysis.

By the end of the program, participants will be able to deliver data-driven, risk-adjusted, and strategically aligned investment recommendations.

Target Audience:

This program is designed for professionals holding or preparing for roles such as:

- Financial and Investment Analyst
- Senior Financial Analyst
- Investment Analyst
- Corporate Financial Analyst
- Equity Analyst
- Portfolio Analyst
- Treasury Analyst
- Capital Budgeting Analyst
- Risk & Investment Analyst
- Asset Management Analyst



Targeted Organizational Departments:

- Corporate Finance
- Investment & Asset Management
- Treasury
- Strategy & Planning
- Mergers & Acquisitions
- Risk Management
- Financial Control
- Business Development

This Corporate Finance Training Program strengthens analytical capacity within departments responsible for investment evaluation, forecasting, portfolio monitoring, and capital allocation decisions.

Targeted Industries:

- Banking & Financial Services
- Investment & Asset Management Firms
- Sovereign Wealth Funds
- Energy & Infrastructure
- Real Estate & Development
- Manufacturing & Industrial Enterprises
- Government Investment Entities
- Large Corporate Groups

Industries requiring structured Advanced Investment Analysis Course competencies and measurable financial evaluation processes will benefit most.

Course Offerings:

By the end of this course, participants will be able to:

- Perform advanced financial statement diagnostics using vertical and horizontal analysis
- Conduct comprehensive Financial Ratio Analysis and Forecasting Course methodologies
- Build structured financial projections and cash flow forecasts
- Apply capital budgeting techniques NPV, IRR, Profitability Index, Payback
- Execute full Financial Modeling and Investment Analysis frameworks
- Conduct equity and bond valuation using DCF and yield analysis
- Calculate beta, apply CAPM, and determine required return
- Quantify portfolio risk using covariance, correlation, and diversification metrics
- Design asset allocation strategies in Investment Strategy and Asset Allocation Training simulations
- Prepare professional investment recommendation reports for executive committees

Training Methodology:

The program uses a structured, performance-driven approach tailored to Financial and Investment Analysis job responsibilities.

Participants will engage in:

- Real financial statement analysis workshops
- Ratio benchmarking and performance diagnostics
- Financial modeling exercises using scenario analysis
- Capital budgeting case simulations
- Valuation modeling workshops
- Portfolio construction and risk optimization sessions
- Investment committee simulation exercises
- Executive-level reporting and recommendation practice

Course Toolbox:

Participants will gain structured insights into:

- Financial statement diagnostic frameworks
- Ratio benchmarking structures
- Forecasting and pro-forma modeling templates
- Free Cash Flow and DCF valuation structures
- Bond pricing and yield calculation frameworks
- CAPM and beta estimation models
- Portfolio diversification matrices
- Asset allocation decision frameworks
- Investment risk evaluation checklists
- Executive investment reporting templates

Note: Tools are not physically provided; participants receive structured insights and practical modeling examples relevant to the Financial and Investment Analysis function.

Course Agenda

Day 1: Financial Statement Analysis & Performance Diagnostics

- **Topic 1:** Financial Statement Architecture – Income Statement, Balance Sheet & Cash Flow Linkages
- **Topic 2:** Vertical and Horizontal Analysis for Investment Evaluation
- **Topic 3:** Financial Ratio Analysis – Liquidity, Profitability, Efficiency & Solvency
- **Topic 4:** DuPont Analysis and Return on Equity Drivers
- **Topic 5:** Earnings Quality Assessment and Red Flag Identification
- **Topic 6:** Industry Benchmarking and Peer Comparison Techniques
- **Reflection & Review:** Applying financial statement diagnostics to support investment screening decisions

Day 2: Financial Modeling, Forecasting & Cost of Capital

- **Topic 1:** Building Pro-Forma Financial Statements for Investment Scenarios
- **Topic 2:** Revenue Forecasting and Operating Cost Projections
- **Topic 3:** Free Cash Flow Modeling for Valuation Purposes
- **Topic 4:** Weighted Average Cost of Capital WACC and Capital Structure Decisions
- **Topic 5:** Scenario, Sensitivity, and Stress Testing in Financial Models
- **Topic 6:** Linking Financial Models to Strategic Capital Allocation Decisions
- **Reflection & Review:** Developing reliable financial forecasts for investment approval

Day 3: Capital Budgeting & Valuation Techniques

- **Topic 1:** Time Value of Money and Discounting Applications
- **Topic 2:** Net Present Value NPV and Internal Rate of Return IRR Analysis
- **Topic 3:** Payback Period, Profitability Index, and Investment Ranking
- **Topic 4:** Discounted Cash Flow DCF Valuation Framework
- **Topic 5:** Equity Valuation – Dividend Models and Growth Assumptions
- **Topic 6:** Bond Valuation and Yield Analysis for Fixed Income Investments
- **Reflection & Review:** Defending capital budgeting decisions using valuation metrics



Day 4: Risk Analysis, CAPM & Portfolio Management

- **Topic 1:** Types of Financial Risk – Market, Credit, Liquidity & Operational Risk
- **Topic 2:** Measuring Risk – Variance, Standard Deviation and Beta
- **Topic 3:** Capital Asset Pricing Model CAPM and Required Return Estimation
- **Topic 4:** Portfolio Diversification, Correlation and Covariance Analysis
- **Topic 5:** Efficient Frontier and Optimal Portfolio Construction
- **Topic 6:** Asset Allocation Strategies and Risk-Return Trade-Off Decisions
- **Reflection & Review:** Designing a risk-adjusted portfolio aligned with strategic objectives

Day 5: Advanced Investment Strategy & Executive Decision-Making

- **Topic 1:** Investment Strategy Formulation and Asset Allocation Frameworks
- **Topic 2:** Performance Measurement – Alpha, Sharpe Ratio & Portfolio Attribution
- **Topic 3:** Investment Committee Simulation and Decision Governance
- **Topic 4:** Capital Allocation Under Uncertainty and Macroeconomic Scenarios
- **Topic 5:** Building Executive-Level Investment Reports and Dashboards
- **Topic 6:** Ethical Considerations and Risk Controls in Investment Analysis
- **Reflection & Review:** Presenting and defending a complete financial and investment analysis case study

FAQ:

What specific qualifications or prerequisites are needed for participants before enrolling in the course?

Participants should have foundational knowledge of financial statements and basic finance concepts. The course is ideal for professionals currently working in or transitioning into Financial and Investment Analysis roles.

How long is each day's session, and is there a total number of hours required for the entire course?

Each day's session is generally structured to last around 4–5 hours, with breaks and interactive activities included. The total course duration spans five days, approximately 20–25 hours of instruction.



How is this course different from general finance training programs?

This program is structured around the real responsibilities of a Financial and Investment Analyst. Instead of covering finance broadly, it focuses on measurable outputs such as valuation models, portfolio risk analysis, capital budgeting decisions, and executive investment reporting.

How This Course is Different from Other Strategic Finance and Investment Analysis Courses:

Most finance programs teach isolated concepts such as ratios, valuation, or portfolio theory independently. This Strategic Finance and Investment Analysis Training Program integrates all core competencies required for a Financial and Investment Analysis job role into one cohesive structure.

Participants progress from financial diagnostics to forecasting, from capital budgeting to valuation, and from risk measurement to portfolio optimization. The course emphasizes measurable decision-making, executive communication, and structured investment recommendation frameworks.

Rather than theory-heavy instruction, the program simulates the real workflow of Financial and Investment Analysts analyzing data, modeling outcomes, quantifying risk, comparing alternatives, and presenting investment decisions to senior leadership.

It is not only a Finance and Investment Analysis Course it is a practical capability-building program for professionals who are directly responsible for evaluating investments and guiding strategic financial decisions.