Advanced Equity Markets and Stock Valuation Training Course

18 – 22 July 2027
Chicago

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Training Center

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Ref: 1181_187227 **Date:** 18 – 22 July 2027 **Location:** Chicago **Fees:** 12000 Euro

Overview

Advanced Equity Markets and Stock Valuation Training Course is a one-week course for investment analysts, portfolio professionals, treasury teams, finance managers, and capital-markets practitioners who need an Equity Investment Analysis and Decision Pack. Participants connect equity-market structure, company and industry analysis, stock valuation, portfolio construction, trading, and risk controls through documented assumptions and decision evidence. Agile Leaders Training Center develops equity markets and stock valuation practice.

Who Should Attend

- Teams responsible for equity research and investment recommendations
- Teams responsible for portfolio construction and benchmark oversight
- Teams responsible for treasury investments and market exposure
- Teams responsible for trading, execution quality, and transaction costs
- Teams responsible for investment risk, governance, and reporting

The course assumes participants can interpret financial statements and basic investment returns; it leaves out personal investment advice, broker selection, certification preparation, and jurisdiction-specific trading rules.

Departments and Industries

The course supports departments and industries that analyze listed companies, allocate capital, execute equity decisions, or oversee investment risk.

- Investment research, asset management, treasury, finance, and risk departments
- Banks, investment firms, insurers, pension organizations, and family offices
- Energy, industrial, technology, healthcare, and consumer-sector finance teams
- Corporate strategy, investor relations, and capital-allocation functions
- Advisory, audit, education, and financial-data organizations

Learning Objectives

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

- Analyze equity-market structure, instruments, orders, and liquidity
- Build industry, company, and earnings-quality analysis files
- Apply dividend, cash-flow, and market-multiple valuation models
- Compare stock value estimates through sensitivity scenarios
- Construct benchmark-aware equity portfolios and risk controls
- Evaluate execution results and document investment decisions

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Course Agenda

Day 1: Equity Markets and Trading Structure

- Primary and Secondary Equity Market Map
- Common and Preferred Share Rights Matrix
- Order-Driven Market and Liquidity Framework
- Market, Limit, and Validity Order Decision Grid
- Trade Lifecycle and Transaction-Cost Checklist

Day 2: Company and Industry Analysis

- Top-Down Economy-Industry-Company Analysis Tree
- Competitive Position and Business-Model Review Canvas
- Financial Statement and Earnings-Quality Diagnostic
- Revenue, Margin, and Capital-Intensity Driver Model
- Equity Research Assumption and Evidence Register

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Day 3: Stock Valuation Models

- Dividend Discount Model Selection Framework
- Free Cash Flow to Equity Forecast Worksheet
- Price and Enterprise-Value Multiples Matrix
- Comparable Company Selection and Normalization Method
- Intrinsic Value Sensitivity and Scenario Table

Day 4: Portfolio and Risk Decisions

- Investment Objective and Constraint Profile
- Equity Universe Screening and Selection Scorecard
- Benchmark, Sector, and Position-Weight Control Grid
- Portfolio Risk, Drawdown, and Liquidity Dashboard
- Investment Thesis Monitoring and Exit Trigger Register

Day 5: Integrated Equity Decision Practice

- Exercise: Diagnose Market Structure and Order Choices
- Exercise: Build the Company Analysis Evidence File
- Exercise: Reconcile Valuation Model Results
- Exercise: Construct and Stress-Test an Equity Portfolio
- Capstone Exercise: Equity Investment Analysis and Decision Pack

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Practical Exercises

The course uses suggested activities that connect market evidence, company fundamentals, valuation assumptions, and portfolio decisions.

- Suggested activity: compare order choices and expected transaction costs for liquid and less-liquid equities
- Suggested activity: build an industry and company driver model for firms in two different sectors
- Suggested activity: reconcile dividend, cash-flow, and multiple-based value estimates under alternative assumptions
- Suggested activity: present a risk-controlled equity recommendation with monitoring and exit triggers

FAQs

Who suits advanced equity markets and stock valuation training?

Investment analysts, portfolio professionals, treasury teams, finance managers, and capital-markets practitioners suit the training. Participants should already interpret financial statements and basic investment returns.

How does equity markets and stock valuation training differ from general investing training?

Equity markets and stock valuation training connects market structure, issuer analysis, valuation models, portfolio construction, execution, and risk evidence, while general investing training usually introduces asset classes and basic portfolio concepts.

Which stock valuation models support equity investment decisions?

Dividend discount, free-cash-flow-to-equity, price-multiple, enterprise-value-multiple, and asset-based approaches can support equity decisions when the model, inputs, and assumptions fit the company and valuation purpose.

How is uncertainty handled in stock valuation?

Stock valuation uncertainty is handled by documenting assumptions, testing sensitivity to earnings, growth, margins, discount rates, and multiples, comparing model outputs, and recording a decision range rather than relying on one point estimate.

How are equity portfolio risks controlled?

Equity portfolio risks are controlled through objective and constraint definitions, benchmark comparison, sector and position limits, liquidity checks, scenario tests, monitoring indicators, and documented exit triggers.

Conclusion

Participants take back an Equity Investment Analysis and Decision Pack containing market maps, company evidence, valuation models, sensitivity tables, portfolio controls, execution checks, and monitoring triggers. The pack makes stock recommendations traceable to data, assumptions, and risk choices. It also aligns research, portfolio, treasury, trading, and governance teams around reviewable decisions.