Financial Statement Analysis for Investors Training Course

Professional Development Training Course Outline

Category	Capital Markets and Investment	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Financial Statement Analysis for Investors Training Course is a comprehensive, data-driven, and performance-focused program designed to equip professionals with advanced financial analysis, investment decision-making, and capital market intelligence skills. This course integrates financial modeling, ratio analysis, valuation techniques, risk assessment, earnings quality evaluation, and cash flow forecasting to enhance strategic investment analysis. Participants gain practical expertise in analyzing income statements, balance sheets, cash flow statements, and equity reports using real-world financial data, enabling evidence-based portfolio management and high-impact investment strategies.

In today’s volatile global financial markets, investors require analytical agility, data interpretation accuracy, and strategic forecasting capability. This training delivers cutting-edge insights aligned with global best practices from institutions such as International Financial Reporting Standards Foundation and Chartered Financial Analyst Institute frameworks. The course emphasizes profitability analysis, liquidity management, solvency evaluation, valuation metrics, financial forecasting, and corporate performance benchmarking to strengthen investment due diligence and maximize shareholder value creation.

Programme Curriculum

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Course Objectives

1. Develop advanced financial statement interpretation and analytical reasoning skills.
2. Apply ratio analysis and KPI benchmarking for investment evaluation.
3. Conduct profitability, liquidity, and solvency analysis using trending financial metrics.
4. Evaluate earnings quality and detect financial statement manipulation risks.
5. Perform cash flow analysis and forecasting for investment sustainability.
6. Apply discounted cash flow (DCF) and relative valuation models.
7. Analyze capital structure and leverage optimization strategies.
8. Assess financial risk exposure and volatility indicators.
9. Interpret IFRS-compliant financial reports for global investment decisions.
10. Utilize financial modeling tools for equity and debt valuation.
11. Conduct industry and competitor benchmarking analysis.
12. Integrate ESG metrics into investment decision frameworks.
13. Strengthen portfolio performance analysis and strategic asset allocation.

Organizational Benefits

- Improved investment decision accuracy and reduced financial risk exposure
- Enhanced capital allocation efficiency
- Stronger financial due diligence capability
- Improved corporate performance benchmarking
- Increased shareholder value creation
- Enhanced forecasting and budgeting precision
- Stronger fraud detection and governance compliance
- Data-driven strategic planning

- Improved investor confidence and reporting transparency
- Competitive advantage in capital markets

Target Audiences

- Investment Analysts
- Equity Research Analysts
- Portfolio Managers
- Corporate Finance Managers
- Investment Bankers
- Financial Consultants
- Risk Management Professionals
- Business Development Executives

Course Duration: 5 days

Course Modules

Module 1: Financial Reporting Framework and Standards

- Overview of IFRS and global reporting standards
- Structure of financial statements
- Accounting policies and disclosures
- Revenue recognition and expense matching
- Financial reporting red flags
- Case Study: IFRS-based reporting analysis of Apple Inc.

Module 2: Income Statement and Profitability Analysis

- Revenue growth trend analysis
- Gross, operating, and net profit margins
- Earnings per share evaluation
- Cost structure diagnostics
- EBITDA and operating leverage analysis
- Case Study: Profitability benchmarking of Microsoft Corporation

Module 3: Balance Sheet and Financial Position Analysis

- Asset quality assessment

- Working capital management
- Liquidity ratios and solvency ratios
- Debt structure evaluation
- Equity structure review
- Case Study: Capital structure review of Tesla, Inc.

Module 4: Cash Flow Analysis and Forecasting

- Operating cash flow analysis
- Free cash flow calculations
- Cash flow sustainability metrics
- Capital expenditure analysis
- Forecast modeling techniques
- Case Study: Cash flow sustainability review of Amazon.com, Inc.

Module 5: Ratio Analysis and KPI Benchmarking

- Profitability ratios
- Liquidity ratios
- Efficiency ratios
- Leverage ratios
- Market value ratios
- Case Study: Ratio benchmarking of Alphabet Inc.

Module 6: Valuation Techniques and Financial Modeling

- Discounted cash flow modeling
- Relative valuation methods
- Comparable company analysis
- Sensitivity analysis
- Scenario planning
- Case Study: Equity valuation of Meta Platforms, Inc.

Module 7: Risk Analysis and Investment Decision-Making

- Financial risk indicators
- Volatility measurement tools

- Beta and market sensitivity
- Credit risk assessment
- Stress testing models
- Case Study: Risk profiling of JPMorgan Chase & Co.

Module 8: Portfolio Performance and ESG Integration

- Portfolio return analysis
- Asset allocation strategies
- Performance attribution
- ESG investment screening
- Sustainable finance metrics
- Case Study: ESG performance review of Unilever PLC

Training Methodology

- Instructor-led expert facilitation
- Interactive financial modeling workshops
- Real-time data analysis exercises
- Case study simulations and group discussions
- Investment scenario analysis
- Practical portfolio evaluation sessions
- Performance benchmarking assignments
- Pre- and post-training assessment tests

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com