Small & Mid-Cap Investing 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

Investing in small and mid-cap companies offers unique opportunities for portfolio growth, higher returns, and market diversification. Small & Mid-Cap Investing Training Course is designed to equip participants with advanced skills in identifying undervalued stocks, analyzing market trends, and mitigating investment risks. Leveraging trending investment strategies, participants will gain hands-on experience in financial modeling, valuation techniques, and fundamental and technical analysis. This course emphasizes the integration of data-driven insights and strategic decision-making to optimize returns in dynamic market environments.

With a focus on practical application, participants will explore real-world case studies, learn to manage small and mid-cap portfolios, and understand the regulatory frameworks and market dynamics that influence these segments. The training incorporates the latest SEO-friendly keywords such as equity analysis, market capitalization, portfolio diversification, risk-adjusted returns, and growth investing. By the end of this course, attendees will possess the knowledge and confidence to implement effective investment strategies in small and mid-cap markets.

Programme Curriculum

Small & Mid-Cap Investing Training Course

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Course Objectives

1. Understand small and mid-cap market structures and investment dynamics
2. Master fundamental and technical analysis techniques for growth stocks
3. Apply financial modeling for valuation and forecasting
4. Identify undervalued investment opportunities using trending indicators
5. Develop portfolio diversification strategies to minimize risk
6. Analyze risk-adjusted returns and optimize investment decisions
7. Evaluate market capitalization and liquidity impacts on investment
8. Understand regulatory compliance and governance in small and mid-cap investing
9. Implement data-driven strategies for investment performance tracking
10. Enhance decision-making using behavioral finance principles
11. Explore emerging market trends in small and mid-cap equities
12. Conduct scenario and sensitivity analysis for robust investment planning
13. Apply ethical investing and ESG (Environmental, Social, Governance) considerations

Organizational Benefits

- Improved portfolio performance and higher ROI
- Enhanced decision-making capabilities for investment teams
- Reduced investment risks through strategic diversification
- Strengthened compliance with market regulations
- Access to advanced analytical tools and techniques
- Increased ability to identify emerging market opportunities
- Better forecasting and financial planning
- Enhanced employee confidence in investment strategy execution
- Improved stakeholder communication and reporting
- Promotion of ethical and sustainable investing practices

Course Duration: 5 days

Target Audiences

1. Investment Analysts
2. Portfolio Managers
3. Financial Advisors
4. Wealth Managers

5. Private Equity Professionals
6. Asset Management Teams
7. Hedge Fund Analysts
8. Retail Investors seeking professional growth

Course Modules

Module 1: Introduction to Small & Mid-Cap Investing

- Overview of market capitalization definitions
- Importance of small and mid-cap stocks in portfolio growth
- Key differences from large-cap investing
- Historical performance trends analysis
- Market liquidity and volatility considerations
- Case Study: Comparative performance of small vs mid-cap companies

Module 2: Fundamental Analysis Techniques

- Evaluating financial statements and ratios
- Assessing growth potential and market positioning
- Identifying undervalued companies
- Sector analysis and benchmarking
- Earnings and revenue trend evaluation
- Case Study: Successful fundamental analysis of a mid-cap stock

Module 3: Technical Analysis Strategies

- Price action and charting techniques
- Moving averages and trend indicators
- Momentum and volume analysis
- Identifying entry and exit points
- Risk management using technical tools
- Case Study: Technical trading strategies on small-cap equities

Module 4: Financial Modeling and Valuation

- Building cash flow models
- Discounted Cash Flow (DCF) analysis
- Price-to-Earnings (P/E) and other valuation multiples
- Sensitivity and scenario analysis
- Forecasting company performance
- Case Study: Valuation of a growing mid-cap company

Module 5: Portfolio Diversification & Risk Management

- Asset allocation strategies for small and mid-cap portfolios
- Risk-adjusted performance metrics
- Diversification to minimize systemic risk
- Portfolio optimization techniques
- Stress-testing and scenario planning
- Case Study: Diversified small-cap investment portfolio

Module 6: Regulatory Compliance & Governance

- SEC and market regulations affecting small-cap companies
- Corporate governance best practices
- Insider trading and reporting obligations
- Legal and ethical considerations
- Compliance monitoring frameworks
- Case Study: Regulatory impact on mid-cap investment decisions

Module 7: Market Trends & Behavioral Finance

- Identifying emerging trends in small and mid-cap markets
- Behavioral biases affecting investment decisions
- Investor sentiment analysis
- Market cycles and macroeconomic influences
- Predictive trend analysis using data insights
- Case Study: Behavioral finance impact on small-cap investing

Module 8: ESG Investing & Ethical Considerations

- ESG criteria and metrics for small and mid-cap companies
- Integrating sustainability into investment strategies
- Impact investing opportunities
- Long-term value creation through ethical practices
- Reporting and benchmarking ESG performance
- Case Study: ESG-driven investment success story

Training Methodology

- Interactive lectures with real-time market analysis
- Hands-on financial modeling exercises
- Case studies for practical understanding

- Group discussions and peer-to-peer learning
- Scenario planning and simulation exercises
- Q&A sessions with market experts

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

Start Date	End Date	Location	Price
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