SQL for Financial Analysis Training Course

Professional Development Training Course Outline

Category	ACCOUNTING & FINANCE	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

SQL for Financial Analysis Training Course is designed to equip professionals with advanced SQL querying skills for financial data extraction, transformation, and analysis. In today's data-driven financial ecosystem, SQL (Structured Query Language) is a core competency for financial analysts, data analysts, investment professionals, and business intelligence experts who need to derive actionable insights from large-scale financial datasets. This training emphasizes financial reporting automation, banking analytics, risk assessment, and corporate financial intelligence using SQL-based tools and techniques.

This course integrates real-world financial scenarios with hands-on SQL database management, enabling learners to perform profitability analysis, cash flow modeling, portfolio analytics, and financial forecasting. With increasing demand for data-driven financial decision-making, SQL has become an essential skill for finance professionals aiming to enhance performance reporting, optimize financial systems, and support strategic business decisions in global organizations.

Programme Curriculum

SQL for Financial Analysis Training Course

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Course Objectives

1. Master SQL fundamentals for financial data analysis and reporting
2. Develop advanced query-writing skills for financial datasets
3. Understand relational database structures in financial systems
4. Perform financial statement analysis using SQL queries
5. Build automated financial reporting dashboards using SQL
6. Analyze banking transactions and investment portfolios using SQL
7. Improve financial forecasting accuracy through data extraction
8. Apply SQL in risk management and compliance reporting
9. Optimize financial data processing workflows
10. Integrate SQL with financial analytics tools and BI systems
11. Enhance decision-making through data-driven financial insights
12. Learn performance tuning for large financial databases
13. Apply SQL in real-world corporate financial case scenarios

Organizational Benefits

- Improved financial decision-making accuracy
- Enhanced automation of financial reporting systems
- Reduced operational financial data processing time
- Better compliance and regulatory reporting efficiency
- Increased data-driven strategic planning capability
- Improved fraud detection and risk mitigation systems
- Stronger financial forecasting and budgeting accuracy
- Enhanced business intelligence integration across departments
- Scalable financial data infrastructure management
- Higher ROI through optimized financial analytics processes

Target Audiences

1. Financial Analysts
2. Investment Analysts
3. Data Analysts in Finance
4. Banking Professionals
5. Risk Management Officers
6. Accounting Professionals
7. Business Intelligence Developers
8. Finance Students & Graduates

Course Duration: 5 days

Course Modules

Module 1: SQL Fundamentals for Finance

- Introduction to SQL syntax and financial applications
- Understanding financial databases and schemas
- Basic SELECT queries for financial data retrieval
- Filtering financial records using WHERE clauses
- Case Study: Global retail banking transaction extraction (JPMorgan-style dataset)
- Data structuring in corporate finance systems

Module 2: Financial Data Querying Techniques

- Advanced filtering for financial datasets
- Sorting and grouping financial records
- Aggregate functions for revenue and expense analysis
- Time-based financial data extraction
- Case Study: Multinational revenue segmentation analysis
- Financial KPI extraction using SQL

Module 3: Financial Reporting with SQL

- Building financial reports using SQL queries
- Automating monthly financial statements
- Profit and loss data structuring
- Balance sheet data extraction
- Case Study: Global FMCG financial reporting system
- Financial reporting accuracy validation

Module 4: Investment & Portfolio Analysis

- SQL for portfolio performance tracking
- Stock and asset data analysis
- Return on investment calculations using SQL
- Risk-adjusted performance metrics
- Case Study: Hedge fund portfolio optimization analysis
- Investment diversification reporting

Module 5: Banking & Transaction Analytics

- Transactional data analysis using SQL
- Fraud detection query structures
- Customer banking behavior analysis
- Loan and credit data evaluation
- Case Study: Digital banking fraud detection system
- Banking compliance reporting

Module 6: Financial Forecasting with SQL

- Historical data extraction for forecasting
- Trend analysis using SQL queries
- Seasonal financial pattern detection
- Revenue forecasting models
- Case Study: Global airline revenue forecasting model
- Predictive financial analytics using SQL

Module 7: Risk Management & Compliance

- SQL for risk exposure analysis
- Regulatory compliance reporting systems
- Credit risk assessment queries
- Financial anomaly detection
- Case Study: Global insurance risk compliance system
- Basel regulatory reporting structure

Module 8: Advanced Financial SQL Optimization

- Query optimization for large financial datasets
- Indexing strategies for financial databases
- Performance tuning techniques
- Integration with BI tools and dashboards
- Case Study: Global stock exchange data optimization system
- Enterprise financial database management

Training Methodology

- Instructor-led live training sessions
- Hands-on SQL coding exercises using financial datasets
- Real-world case study simulations
- Project-based learning approach
- Interactive problem-solving workshops
- Capstone project on financial data analysis
- Continuous assessment and feedback loops

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

Start Date	End Date	Location	Price
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