

Financial analyses on particular data, payroll systems

4 – 8 January 2027
Boston, Massachusetts (USA)

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Introduction

The Financial Analysis Course is an in-depth, comprehensive program designed to equip participants with critical skills and knowledge to perform robust financial analysis. Financial analysis is a cornerstone of strategic decision-making and plays a vital role in evaluating an organization's financial health and overall performance.

Understanding what financial analysis is and mastering its various methods empowers professionals to make data-driven decisions that drive business growth and value creation.

This course offers hands-on exposure to financial statement analysis, financial forecasting techniques, and advanced tools such as DuPont analysis and Economic Value Added EVA. Participants will gain practical experience through real-world case studies, practical exercises, and strategic simulations.

By the end of this program, you will master both basic financial analysis skills and advanced techniques, enabling you to confidently evaluate financial performance, support strategic planning, and communicate insights effectively.

Course Objectives

Upon completing this course, participants will be able to:

- Develop a comprehensive understanding of financial analysis and its importance in business decision-making.
- Interpret and analyze key financial statements: income statement, balance sheet, and cash flow statement.
- Apply financial ratio analysis to assess profitability, liquidity, solvency, and efficiency.
- Master financial planning and forecasting techniques to guide business strategy.
- Use advanced analysis tools, including DuPont analysis and Economic Value Added EVA, for deeper performance insights.
- Build integrated financial models and conduct scenario analyses to evaluate strategic options.
- Align financial analysis with long-term value creation and corporate strategy.
- Confidently apply financial analysis methods to real-world scenarios and communicate findings to stakeholders.

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A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver, set against a background of concentric circles.

Course Outlines

Day 1: Introduction to Financial Analysis

- Understand the fundamentals and importance of financial analysis in corporate and investment contexts.
- Learn the basics of financial statements analysis, covering the income statement, balance sheet, and cash flow statement.
- Explore the objectives of financial analysis and its role in benchmarking and industry comparisons.

Day 2: Financial Ratio Analysis

- Introduction to profitability, liquidity, solvency, and efficiency ratios.
- Analyze key ratios such as gross margin, operating margin, return on equity ROE, and return on assets ROA.
- Evaluate financial stability through liquidity ratios e.g., current ratio and solvency ratios e.g., debt-to-equity.

Day 3: Efficiency and Activity Ratios

- Analyze operational efficiency using inventory turnover, receivables turnover, and payables turnover ratios.
- Understand the asset turnover ratio and cash conversion cycle to assess financial health.
- Learn how these efficiency metrics support strategic decision-making.

Day 4: Forecasting Techniques and Advanced Tools

- Master financial forecasting techniques, including trend analysis, regression analysis, and time-series forecasting.
- Explore DuPont analysis to break down ROE and uncover drivers of performance.
- Use Economic Value Added EVA to evaluate economic profit and guide strategic initiatives.

Day 5: Practical Application of Financial Analysis

- Conduct hands-on case studies and simulations to apply learned methods in real-world scenarios.
- Evaluate investment opportunities and corporate financial health.
- Develop skills to clearly communicate financial findings to stakeholders, supporting strategic decisions.

A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver. The board is checkered and has a subtle grid pattern.

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Why Attend This Course: Wins & Losses!

- Gain in-depth knowledge of financial analysis and its critical role in business success.
- Master key financial analysis methods and advanced techniques for strategic decision-making.
- Enhance your expertise in financial planning, forecasting, and performance evaluation.
- Learn to use advanced tools like DuPont analysis and EVA for deeper financial insights.
- Build confidence in developing integrated models and scenario plans to support executive decisions.
- Strengthen your profile with a financial analysis certification that improves your market competitiveness.
- Prepare to lead and advise on financial strategies within your organization.

Conclusion

The Financial Analysis Course is an essential resource for anyone looking to master the art and science of financial analysis. Through a blend of theory, practical exercises, and real-world case studies, you will develop the skills needed to assess organizational performance, make informed investment decisions, and guide your organization toward long-term success.

Whether you're a beginner aiming to develop basic skills or an experienced professional seeking advanced mastery, this program will equip you with the tools to excel. Enroll today to elevate your expertise and become a certified financial analyst ready to thrive in today's competitive business environment!

A graphic of a chessboard with several pawns. A large gold king piece is in the foreground, with a silver pawn and a gold pawn behind it. The board is checkered, and there are concentric circles in the background.

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