

Financial analyses

Lisbon (Portugal)

9 - 13 June 2025

UK Training

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Financial analyses

Code: FA28 From: 9 - 13 June 2025 City: Lisbon (Portugal) Fees: 4400 Pound

Introduction

The Financial Analysis Course is a comprehensive program designed to equip participants with essential skills and knowledge for conducting in-depth financial analysis. Financial analysis is a cornerstone of decision-making and plays a pivotal role in assessing the financial health and performance of organizations. Understanding what financial analysis is and mastering its various methods can empower professionals to make informed decisions that drive business success. This course provides a detailed exploration of financial planning and analysis, offering participants hands-on experience with financial statements analysis, financial forecasting techniques, and other advanced tools.

By the end of this course, participants will be proficient in financial analysis, from interpreting financial statements to applying advanced financial analysis techniques like DuPont analysis and Economic Value Added EVA. With a combination of theoretical discussions, practical exercises, and real-world case studies, this financial analysis certification program will help you enhance your financial decision-making abilities.

Course Objectives

- Gain a comprehensive understanding of what financial analysis is and its critical role in organizational decision-making.
- Master the interpretation of financial statements, including the income statement, balance sheet, and cash flow statement.
- Learn to apply financial ratio analysis to evaluate company performance, including profitability, liquidity, solvency, and efficiency ratios.
- Develop expertise in financial forecasting and its application in strategic planning.
- Explore advanced financial analysis tools such as DuPont analysis and EVA, providing a deeper understanding of financial performance measurement.
- Enhance your ability to apply financial analysis techniques in real-world scenarios, improving your decision-making skills.

Course Outlines

Day 1: Introduction to Financial Analysis

- Understanding financial analysis and its importance in both corporate and investment decision-making.
- Learn the basics of financial statements analysis, including income statements, balance sheets, and cash flow statements.
- Explore the financial analysis definition and its key objectives, emphasizing benchmarking and comparison across industries.

Day 2: Financial Ratio Analysis

A graphic of a chessboard with several chess pieces (a king, a queen, a rook, and a knight) positioned on it. The board is white and black, and the pieces are gold and silver. The text 'UK Training PARTNER' is overlaid on the right side of the board.

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- Introduction to types of financial analysis, focusing on profitability, liquidity, and solvency ratios.
- Delve into key ratios such as gross margin, operating margin, return on equity ROE, and return on assets ROA for profitability assessment.
- Understand why financial analysis is important by exploring liquidity ratios like the current ratio and solvency ratios like the debt-to-equity ratio.

Day 3: Efficiency and Activity Ratios

- Examine efficiency ratios and their role in analyzing business operations, including inventory turnover, receivables turnover, and payables turnover.
- Discover how asset turnover ratios such as total asset turnover can help assess the effective use of resources.
- Learn how the cash conversion cycle affects liquidity and working capital management, essential for basic financial analysis skills.

Day 4: Forecasting Techniques and Advanced Analysis Tools

- Dive into financial planning and analysis by learning forecasting techniques, including trend analysis, regression analysis, and time series analysis.
- Understand how DuPont analysis can decompose ROE to give deeper insights into financial performance.
- Explore advanced financial analysis tools like Economic Value Added EVA, which measures true economic profit and adds value to decision-making processes.

Day 5: Practical Application of Financial Analysis

- Apply the skills acquired through case studies on financial analysis and decision-making.
- Learn how to conduct a comprehensive financial analysis to evaluate potential investment opportunities.
- Develop the ability to assess the financial health of companies through various financial analysis methods.
- Gain insight into how to effectively communicate your financial findings to stakeholders, an essential skill for anyone pursuing an advanced financial analysis course.

Conclusion

This Financial Analysis Course is an invaluable resource for professionals looking to gain a deeper understanding of what financial planning and analysis entails. Through this program, participants will master the art of financial analysis, including both basic financial analysis skills and more advanced techniques. By understanding the advantages of financial analysis and applying these concepts in practical scenarios, you will be better equipped to assess company performance, make informed investment decisions, and contribute meaningfully to your organization's financial strategy.

Enroll today to enhance your expertise and take a significant step toward becoming a certified financial analyst with an edge in today's competitive market!

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