BLACKBIRD FOR TRAINING

Business & Investment Analysis

26 – 30 July 2027
Amsterdam (Netherlands)

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Ref: 3255875_354479 **Date:** 26 – 30 July 2027 **Location:** Amsterdam (Netherlands) **Fees:** 5200 GBP

Introduction

In today's dynamic business environment, organizations need professionals who can analyze markets, evaluate investment opportunities, interpret financial performance, and support strategic decision-making with confidence. Business and investment analysis has become an essential capability for managers, analysts, investors, entrepreneurs, and decision-makers who aim to identify opportunities, reduce risks, and create sustainable business value.

This intensive 1-week course provides participants with a practical understanding of business analysis, investment evaluation, financial interpretation, market assessment, risk analysis, and strategic decision-making. The program is designed to help participants assess business performance, evaluate investment proposals, analyze financial and non-financial indicators, and prepare professional recommendations for management and investors.

Through practical tools, real-world case studies, group exercises, and applied analysis techniques, participants will learn how to transform business and financial data into meaningful insights. The course also focuses on investment feasibility, return assessment, business valuation basics, risk evaluation, and presentation of investment recommendations.

By the end of this program, participants will be equipped with the analytical mindset and practical tools needed to support better business decisions, identify profitable investment opportunities, and contribute effectively to organizational growth.

Course Objectives

By the end of the Business & Investment Analysis course, participants will be able to:

- Understand the role of business and investment analysis in strategic decision-making.
- Analyze business performance using financial and operational indicators.
- Evaluate investment opportunities using practical financial analysis tools.
- Interpret financial statements and key business metrics.
- Assess market conditions, industry trends, and competitive positioning.
- Apply investment appraisal methods such as ROI, payback period, NPV, and IRR.
- Identify business risks and evaluate their potential impact on investment decisions.
- Conduct basic business valuation and investment feasibility analysis.
- Compare alternative investment options and recommend the most suitable choice.
- Prepare professional business and investment analysis reports.
- Present investment findings and recommendations clearly to stakeholders and decision-makers.



Course Outlines

Day 1: Foundations of Business and Investment Analysis

- Introduction to business and investment analysis.
- Understanding the role of analysis in business decision-making.
- Difference between business analysis, financial analysis, and investment analysis.
- Key components of a business opportunity.
- Understanding business models and value creation.
- Identifying internal and external factors affecting business performance.
- Overview of investment decision-making frameworks.
- Introduction to financial and non-financial business indicators.
- Practical exercise: Analyzing a business opportunity from a strategic perspective.

Day 2: Financial Statement Analysis and Business Performance

- Understanding financial statements: income statement, balance sheet, and cash flow statement.
- Reading financial statements from an analyst's perspective.
- Key financial ratios and what they reveal about business performance.
- Profitability, liquidity, solvency, and efficiency analysis.
- Cash flow analysis and its importance in investment decisions.
- Identifying financial strengths and weaknesses.
- Linking financial performance with business strategy.
- Practical case study: Evaluating the financial health of a company.
- Group discussion: What makes a business financially attractive?

Day 3: Market, Industry, and Competitive Analysis

- Understanding market analysis and its role in investment decisions.
- Identifying market size, demand drivers, and growth potential.
- Analyzing industry trends and business cycles.
- Competitive analysis and positioning.
- Using SWOT analysis for business evaluation.
- Understanding customer segments and revenue potential.
- Assessing barriers to entry and competitive advantages.
- Evaluating external risks affecting business performance.
- Practical exercise: Conducting a market and competitor analysis for an investment opportunity.



Day 4: Investment Appraisal and Risk Evaluation

- Introduction to investment appraisal.
- Understanding investment cost, return, and risk.
- Applying Return on Investment analysis.
- Payback period and discounted payback period.
- Net Present Value and Internal Rate of Return.
- Comparing alternative investment opportunities.
- Understanding business valuation basics.
- Identifying financial, operational, market, and strategic risks.
- Applying sensitivity analysis to investment decisions.
- Practical workshop: Evaluating an investment proposal using financial appraisal tools.

Day 5: Business Case Development and Investment Presentation

- Building a structured business case.
- Combining financial, market, and strategic analysis.
- Preparing investment recommendations.
- Writing a professional business and investment analysis report.
- Developing executive summaries for decision-makers.
- Presenting analysis findings with clarity and confidence.
- Using charts, tables, and dashboards to communicate insights.
- Final group project: Business and investment opportunity analysis.
- Final presentations with instructor feedback.
- Key lessons learned and action planning.

Why Attend this Course: Wins & Losses!

- Gain practical skills in analyzing business opportunities and investment proposals.
- Learn how to evaluate business performance using financial and operational indicators.
- Strengthen your ability to read and interpret financial statements.
- Understand how to assess markets, competitors, and industry trends.
- Master essential investment appraisal tools such as ROI, payback period, NPV, and IRR.
- Improve your ability to identify risks before making investment decisions.
- Learn how to compare investment alternatives and recommend the best option.
- Build confidence in preparing business cases and investment reports.
- Enhance your ability to present analysis findings to managers, investors, and stakeholders.
- Reduce the risk of poor investment decisions by using structured analysis.
- Support career growth in business analysis, investment analysis, corporate finance, strategy, and consulting.

Conclusion

The Business & Investment Analysis course provides participants with a practical and structured approach to evaluating businesses, analyzing investment opportunities, and supporting strategic decision-making.



Over five intensive days, participants will learn how to interpret financial statements, assess business performance, evaluate markets and competitors, apply investment appraisal tools, identify risks, and prepare professional recommendations for decision-makers.

By combining financial analysis, market assessment, risk evaluation, and business case development, this course helps participants turn data into clear insights and investment decisions into well-supported strategies. In a competitive business environment, successful decisions require more than intuition. They require structured analysis, sound judgment, and the ability to communicate recommendations effectively. This course gives participants the tools and confidence to do exactly that.

FAQ

What is investment analysis, and why is it important?

Investment analysis is the process of evaluating investment opportunities using financial, operational, and market data to support informed decision-making. This course explains the principles of investment analysis and strategy, helping participants assess returns, identify risks, compare investment alternatives, and make well-informed business and investment decisions.

Does the course cover investment portfolio analysis and performance evaluation?

Yes. The course introduces the fundamentals of investment analysis and portfolio management, including investment portfolio analysis basics, portfolio diversification concepts, and investment performance analysis. Participants learn how to evaluate investment results, compare portfolio performance, and apply analytical techniques that support long-term investment success.

What investment analysis tools will I learn?

Participants gain hands-on experience with a variety of investment analysis tools, including ROI, Payback Period, Net Present Value NPV, Internal Rate of Return IRR, sensitivity analysis, financial ratio analysis, and business valuation techniques. The course also introduces practical investment style analysis tools used to evaluate investment opportunities across different industries.

Does the course include risk analysis and market research?

Absolutely. The program covers investment risk analysis, investment research and analysis, and market assessment techniques that help participants evaluate industry trends, competitive positioning, and financial performance. It also discusses what is technical analysis in investing as part of a broader investment decision-making framework, while emphasizing fundamental business and financial analysis.



Who should attend this Business & Investment Analysis course?

This course is designed for financial analysts, investment professionals, portfolio managers, business analysts, corporate finance specialists, entrepreneurs, consultants, and decision-makers seeking to strengthen their expertise in investment analysis, investment portfolio analysis, business valuation, market assessment, and strategic investment planning. It is also valuable for professionals involved in investment analysis for asset managers and organizational investment decision-making.

