



ACCOUNTING AND FINANCE | AF-035

Chartered Financial Analyst

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Course content

Why Attend

Financial analysis and investment management require a sophisticated understanding of financial markets, investment instruments, corporate financial performance, portfolio construction, and risk management. Professionals operating in these fields must evaluate complex financial information, assess investment opportunities, and make informed decisions while maintaining high standards of ethics and professional integrity.

The Chartered Financial Analyst (CFA) designation is a globally recognised professional qualification awarded by CFA Institute. Its body of knowledge encompasses investment analysis, financial statement analysis, economics, quantitative methods, corporate issuers, equity investments, fixed income, derivatives, alternative investments, portfolio management, and ethical and professional standards.

Course Methodology

- The programme combines instructor-led financial analysis discussions, quantitative problem-solving exercises, investment valuation workshops, financial statement case studies, portfolio management simulations, and ethics-based decision scenarios.
- Participants work with illustrative financial statements, market data, investment instruments, valuation assumptions, and portfolio information to develop analytical models and evaluate investment decisions.
- Practical exercises cover financial ratio analysis, time value of money calculations, equity valuation, bond pricing, investment risk measurement, and portfolio performance evaluation.
- The course is an intensive professional development programme rather than a substitute for the complete CFA Programme curriculum. Participants intending to pursue the CFA designation should use the official CFA Institute curriculum and examination requirements for their chosen examination level.

Course Objectives

- Explain the structure of financial markets and the roles of major investment instruments
- Apply fundamental quantitative methods to financial and investment analysis
- Interpret economic indicators and their implications for investment decisions
- Analyse financial statements and assess corporate financial performance

Course content

- Evaluate corporate financing and capital investment decisions
- Apply fundamental equity valuation techniques

| Target Audience

- This course is suitable for:
- Investment analysts and research professionals
- Portfolio managers and investment associates
- Financial analysts and corporate finance professionals

Course outline

Detailed course outline

Day-by-day outline for Chartered Financial Analyst.

Day 1 - Ethical Standards, Quantitative Methods and Economic Analysis

- 09:00-09:39 | Understanding the investment management profession, the structure of the CFA Programme, and the importance of professional competence and ethical conduct
- 09:39-10:18 | Exploring the CFA Institute Code of Ethics and Standards of Professional Conduct, including integrity, independence, conflicts of interest, and duties to clients
- 10:18-10:57 | Applying time value of money principles, present value, future value, discounting, compounding, and annuity calculations
- 10:57-11:00 | Using statistical concepts such as expected returns, variance, standard deviation, covariance, correlation, and probability distributions in financial analysis
- 11:00-11:30 | Coffee break
- 11:30-12:05 | Using statistical concepts such as expected returns, variance, standard deviation, covariance, correlation, and probability distributions in financial analysis (continued)
- 12:05-12:43 | Examining macroeconomic indicators, monetary policy, fiscal policy, inflation, interest rates, exchange rates, and their influence on financial markets
- 12:43-14:00 | Practical workshop: Solving quantitative investment problems and analysing the implications of economic developments for financial assets

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Day 2 - Financial Statement Analysis and Corporate Finance

- 09:00-09:39 | Understanding financial reporting principles and analysing the statement of financial position, income statement, and statement of cash flows
- 09:39-10:18 | Evaluating corporate profitability, liquidity, solvency, operational efficiency, and financial performance through ratio analysis
- 10:18-10:57 | Examining accounting policies, revenue recognition, inventory valuation, depreciation, and financial reporting adjustments that influence investment analysis
- 10:57-11:00 | Assessing financial statement quality, earnings sustainability, cash flow generation, and potential financial reporting warning signs
- 11:00-11:30 | Coffee break
- 11:30-12:05 | Assessing financial statement quality, earnings sustainability, cash flow generation, and potential financial reporting warning signs (continued)
- 12:05-12:43 | Applying corporate finance principles covering capital budgeting, financing decisions, capital structure, and weighted average cost of capital
- 12:43-14:00 | Practical exercise: Analysing a company's financial statements and preparing a corporate financial assessment with profitability, liquidity, leverage, and investment observations

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Day 3 - Equity Investments, Fixed Income and Investment Valuation

- 09:00-09:39 | Understanding equity market structures, common and preferred shares, equity indices, and fundamental approaches to company analysis
- 09:39-10:18 | Applying equity valuation techniques, including dividend discount models, discounted cash flow analysis, and price-based valuation multiples
- 10:18-10:57 | Evaluating company fundamentals, earnings expectations, growth assumptions, competitive positioning, and factors influencing intrinsic value
- 10:57-11:00 | Understanding fixed-income instruments, bond characteristics, coupon structures, maturity, yield to maturity, and credit quality
- 11:00-11:30 | Coffee break
- 11:30-12:05 | Understanding fixed-income instruments, bond characteristics, coupon structures, maturity, yield to maturity, and credit quality (continued)
- 12:05-12:43 | Calculating bond prices and examining the relationships between interest rates, bond yields, duration, and fixed-income price sensitivity
- 12:43-14:00 | Valuation workshop: Comparing equity valuation estimates and fixed-income investment opportunities using financial models and market assumptions

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Day 4 - Derivatives, Alternative Investments and Financial Risk Management

- 09:00-09:39 | Understanding derivative instruments, including forwards, futures, options, and swaps, and their applications in hedging and investment strategies
- 09:39-10:18 | Examining derivative payoff structures, basic valuation principles, leverage, counterparty exposure, and market risk considerations
- 10:18-10:57 | Exploring alternative investments, including real estate, private equity, infrastructure, commodities, and selected investment fund structures
- 10:57-11:00 | Assessing investment risks involving market volatility, interest rates, credit quality, liquidity, currency movements, and concentration
- 11:00-11:30 | Coffee break
- 11:30-12:05 | Assessing investment risks involving market volatility, interest rates, credit quality, liquidity, currency movements, and concentration (continued)
- 12:05-12:43 | Applying risk measurement techniques, including volatility, correlation, beta, value at risk concepts, and scenario analysis
- 12:43-14:00 | Case study: Evaluating a multi-asset investment exposure and recommending appropriate diversification and risk mitigation measures

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Day 5 - Portfolio Management, Investment Performance and Professional Application

- 09:00-09:30 | Understanding portfolio management principles, investment objectives, risk tolerance, investment constraints, and investment policy statements
- 09:30-10:00 | Exploring modern portfolio theory, diversification benefits, efficient frontier concepts, and the relationship between expected return and portfolio risk
- 10:00-10:30 | Applying asset allocation principles across equities, fixed income, cash, and alternative investments
- 10:30-11:00 | Evaluating investment performance using benchmarks, total return, the Sharpe ratio, the Treynor ratio, and Jensen's alpha
- 11:00-11:30 | Coffee break
- 11:30-12:00 | Applying ethical judgement to investment recommendations, research communication, client suitability, performance presentation, and conflicts of interest
- 12:00-13:00 | Capstone exercise: Developing and presenting an Investment Analysis and Portfolio Recommendation incorporating economic analysis, financial statement assessment, asset valuation, risk evaluation, portfolio allocation, performance measures, and ethical considerations
- 13:00-13:30 | Certificate and CFA Designation Note: This five-day course is an independent professional development programme covering selected concepts associated with the CFA Programme. Completion does not confer the Chartered Financial Analyst (CFA) designation, CFA Institute membership, or credit towards passing CFA examinations.
- 13:30-14:00 | The CFA charter is awarded exclusively by CFA Institute to individuals who satisfy its examination, qualifying professional experience, membership, and other applicable requirements. Any certificate issued for this training is a provider-issued certificate of attendance or completion, not an official CFA Institute qualification. The course should not be advertised as CFA Institute-accredited or officially endorsed unless such status has been independently verified.

Seminar dates

Available seminar dates

Live dates and pricing for Chartered Financial Analyst generated from the course details page.

Date	Location	Format	Fee
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No seminar dates are currently available.