Excel for Investment Analysis Training Course

Professional Development Training Course Outline

Category	Capital Markets and Investment	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Excel for Investment Analysis Training Course is designed to equip finance professionals, investment analysts, and decision-makers with advanced skills in Excel, enabling them to perform comprehensive financial modeling, valuation, and portfolio analysis with efficiency and accuracy. Participants will explore industry-standard Excel tools, functions, and techniques to transform raw financial data into actionable investment insights. This course integrates practical applications, trending investment strategies, and analytical frameworks to ensure participants can make data-driven investment decisions confidently.

By focusing on real-world case studies and hands-on exercises, this training empowers participants to streamline financial reporting, automate investment calculations, and enhance forecasting accuracy. Participants will develop competencies in advanced Excel functions, data visualization, and scenario modeling, ensuring a robust understanding of investment performance evaluation and risk assessment. This course serves as a bridge between theoretical investment concepts and practical Excel application, fostering both strategic and operational proficiency in investment analysis.

Programme Curriculum

Excel for Investment Analysis Training Course

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Course Objectives

1. Master advanced Excel functions for investment analysis.
2. Apply financial modeling techniques to evaluate investment opportunities.
3. Perform discounted cash flow and net present value calculations efficiently.
4. Conduct portfolio optimization using Excel Solver and data tables.
5. Design dynamic dashboards for investment reporting and visualization.
6. Implement sensitivity and scenario analysis to support decision-making.
7. Analyze historical financial data to identify trends and patterns.
8. Automate repetitive investment tasks with Excel macros.
9. Apply risk management techniques using Excel-based tools.
10. Integrate market data and financial indicators for strategic insights.
11. Conduct equity and fixed-income analysis using Excel models.
12. Develop valuation models for stocks, bonds, and derivatives.
13. Evaluate investment performance and prepare actionable reports.

Organizational Benefits

1. Increased accuracy and efficiency in investment analysis.
2. Improved decision-making based on actionable data insights.
3. Enhanced reporting and visualization for stakeholders.
4. Reduced time in financial modeling and portfolio management tasks.
5. Improved risk assessment and management processes.
6. Streamlined investment operations through automation.
7. Stronger alignment of financial analysis with organizational goals.
8. Increased employee competency in Excel and investment analytics.
9. Better forecasting and scenario planning capabilities.
10. Higher return on investment through data-driven strategies.

Target Audiences

1. Investment analysts and portfolio managers.
2. Financial planners and advisors.
3. Corporate finance professionals.
4. Risk management specialists.
5. Accounting and finance executives.
6. Equity and debt analysts.
7. Treasury and capital markets professionals.
8. Students pursuing finance or investment careers.

Course Duration: 5 days

Course Modules

Module 1: Advanced Excel Functions for Investment Analysis

- Logical, lookup, and reference functions.
- Text and date manipulation functions for financial modeling.
- Statistical and financial functions for portfolio evaluation.
- Array formulas and dynamic ranges for real-time calculations.
- Case Study: Building a financial model for equity valuation.
- Hands-on practical exercises.

Module 2: Financial Modeling Techniques

- Structuring models for valuation and scenario analysis.
- Linking income statements, balance sheets, and cash flows.
- Creating dynamic and flexible models.
- Error checking and validation techniques.
- Case Study: Modeling a corporate acquisition deal.
- Hands-on practical exercises.

Module 3: Discounted Cash Flow and Valuation

- DCF methodology and assumptions.
- Calculating net present value and internal rate of return.
- Adjusting for risk and uncertainty.
- Forecasting cash flows using Excel tools.
- Case Study: Valuation of a high-growth company.
- Hands-on practical exercises.

Module 4: Portfolio Analysis and Optimization

- Portfolio theory and diversification principles.
- Using Excel Solver for optimization.
- Risk-return analysis and efficient frontier creation.
- Asset allocation modeling.
- Case Study: Constructing an optimal investment portfolio.
- Hands-on practical exercises.

Module 5: Scenario and Sensitivity Analysis

- Using data tables and scenario manager.
- Stress testing financial models.
- Evaluating investment risks under different conditions.
- Sensitivity charts and tornado diagrams.
- Case Study: Sensitivity analysis for a bond portfolio.
- Hands-on practical exercises.

Module 6: Data Visualization and Dashboards

- Creating interactive charts and dashboards.
- Using conditional formatting for insights.
- Dynamic pivot tables for reporting.
- Linking dashboards to live financial data.
- Case Study: Dashboard for monitoring stock performance.
- Hands-on practical exercises.

Module 7: Automation with Macros and VBA

- Recording and editing macros for repetitive tasks.
- Basic VBA scripting for investment models.
- Automating data imports and calculations.
- Error handling and debugging in VBA.
- Case Study: Automating portfolio rebalancing calculations.
- Hands-on practical exercises.

Module 8: Investment Performance Evaluation

- Calculating ROI, alpha, beta, and other performance metrics.
- Comparing actual vs. expected investment returns.
- Benchmarking against market indices.
- Preparing executive-level investment reports.
- Case Study: Performance analysis of a mixed asset fund.
- Hands-on practical exercises.

Training Methodology

- Instructor-led interactive sessions.
- Hands-on exercises with real-world investment datasets.
- Step-by-step guidance for building Excel models.
- Case study analysis and practical application.
- Group discussions to encourage peer learning.
- Assessment quizzes and feedback sessions.

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