Training Course on Advanced Financial Modelling and Analysis

Professional Development Training Course Outline

Category	Business	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s fast-paced business environment, Advanced Financial Modelling & Analysis is a critical skill for finance professionals, investors, and business leaders looking to make data-driven decisions, optimize financial performance, and enhance strategic planning. This intensive course is designed to equip participants with cutting-edge financial modelling techniques, valuation methodologies, risk assessment tools, and scenario analysis to develop robust financial models that drive business success.

Through hands-on exercises, real-world case studies, and expert-led sessions, participants will gain a deep understanding of financial forecasting, capital budgeting, investment analysis, M&A modelling, and financial statement projections. Whether you are a finance professional, entrepreneur, or investor, this course will help you build dynamic, scalable financial models that support better decision-making, risk management, and long-term value creation.

Programme Curriculum

Training Course on Advanced Financial Modelling & Analysis

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Course Objectives

1. Build dynamic and scalable financial models for business decision-making.
2. Apply advanced Excel functions and automation for financial analysis.
3. Develop three-statement financial models with accurate projections.
4. Master DCF (Discounted Cash Flow) and valuation techniques for investment analysis.
5. Conduct sensitivity and scenario analysis for risk assessment.
6. Perform mergers & acquisitions (M&A) modeling with deal structuring techniques.
7. Utilize leveraged buyout (LBO) modeling for private equity transactions.
8. Analyze capital budgeting and cost of capital for corporate finance.
9. Construct break-even and profitability analysis models for financial planning.
10. Apply Monte Carlo simulations and financial risk modeling techniques.
11. Use financial dashboards and data visualization for executive reporting.
12. Interpret financial models to make data-driven business decisions.
13. Gain insights into AI and machine learning applications in financial modeling.

Organizational Benefits

1. Improved financial decision-making through data-driven insights.
2. Enhanced capital allocation and investment efficiency.
3. Increased accuracy in financial forecasting and planning.
4. Stronger risk management and scenario analysis capabilities.
5. Optimized budgeting and resource allocation strategies.
6. Better evaluation of mergers, acquisitions, and corporate finance decisions.

7. Increased operational efficiency through financial automation.
8. Strengthened ability to attract investors and secure funding.
9. Improved profitability analysis and cost management.
10. Enhanced financial reporting and compliance with industry standards.

Target Participants

1. Financial Analysts & Investment Professionals
2. Corporate Finance Managers & CFOs
3. Investment Bankers & Private Equity Analysts
4. Entrepreneurs & Business Owners
5. Accountants & Auditors
6. Risk Managers & Treasury Professionals
7. Consultants & Business Advisors
8. University Students & Researchers in Finance & Economics

Course Outline

Module 1: Introduction to Financial Modelling

- Importance of financial modelling in decision-making
- Types of financial models and their applications
- Case study: How Amazon uses financial models for growth
- Common challenges in financial modelling
- Workshop: Structuring a financial model from scratch

Module 2: Advanced Excel Functions for Financial Modelling

- Mastering **VLOOKUP, INDEX-MATCH, and array formulas**
- Using **macros and VBA for automation**
- Case study: How automation enhances financial analysis efficiency
- Conditional formatting and data validation for financial reports
- Hands-on exercise: Creating automated financial templates

Module 3: Building Three-Statement Financial Models

- Integrating **income statement, balance sheet, and cash flow statements**
- Forecasting revenue, expenses, and working capital
- Case study: Three-statement modelling of Tesla’s financials
- Linking financial statements with formulas and logic
- Workshop: Constructing a fully integrated financial model

Module 4: Discounted Cash Flow (DCF) Valuation Modelling

- Understanding **time value of money and discounting techniques**
- Calculating **weighted average cost of capital (WACC)**
- Case study: DCF valuation of Apple Inc.
- Sensitivity analysis for valuation risk assessment
- Practical session: Building a DCF model from scratch

Module 5: Sensitivity & Scenario Analysis in Financial Modelling

- Identifying **key drivers and risk factors**
- Creating **scenario analysis with best-case and worst-case outcomes**
- Case study: Scenario planning in Netflix's strategic decisions
- Monte Carlo simulations for probability-based forecasting
- Workshop: Designing a risk-adjusted financial model

Module 6: Mergers & Acquisitions (M&A) Financial Modelling

- Understanding **deal structures, synergies, and valuation multiples**
- Building a **merger model and analysing accretion/dilution**
- Case study: Disney's acquisition of 21st Century Fox
- Impact of financing decisions on M&A deals
- Hands-on exercise: Constructing an M&A valuation model

Module 7: Leveraged Buyout (LBO) Modelling

- Mechanics of LBO financing and return analysis
- Case study: Blackstone's LBO of Hilton Hotels
- Modelling debt paydown and exit assumptions
- Evaluating PE investment returns through IRR and MOIC
- Practical session: Structuring an LBO financial model

Module 8: Capital Budgeting & Cost of Capital Analysis

- Evaluating investment projects with **NPV and IRR**
- Understanding **cost of capital and capital structure optimization**
- Case study: Google's investment in renewable energy projects
- Practical use of **hurdle rates and payback periods**
- Workshop: Building a capital budgeting model

Module 9: Financial Dashboards & Data Visualization

- Designing **interactive dashboards for financial reporting**
- Case study: How Tableau is used for financial analytics
- Creating **real-time financial KPIs and trends analysis**
- Visualization techniques in Power BI and Excel
- Hands-on exercise: Building a financial dashboard

Module 10: Risk Management & Monte Carlo Simulations

- Introduction to **financial risk assessment methodologies**

- Conducting **stress testing and Monte Carlo simulations**
- Case study: Risk modelling in global investment funds
- Identifying key financial risks in forecasting
- Workshop: Running simulations for financial projections

Module 11: Financial Reporting & Corporate Governance

- Best practices in **financial statement preparation and auditing**
- Understanding **IFRS and GAAP compliance**
- Case study: Corporate governance failures and lessons learned
- Tools for effective financial reporting and transparency
- Workshop: Developing a compliance-ready financial report

Module 12: AI & Machine Learning in Financial Modelling

- Applications of **AI in financial forecasting and fraud detection**
- Case study: How AI is used in algorithmic trading
- Predictive analytics in corporate finance
- Automating financial models with AI-powered tools
- Hands-on session: AI-driven financial forecasting models

Module 13: Corporate Valuation & Equity Research

- Valuation techniques: **Comparables, precedent transactions, and asset-based**
- Case study: Valuation of emerging tech companies
- Conducting **equity research for investment decisions**
- Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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