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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.

Developing expertise across these disciplines enables finance and investment professionals to understand how economic developments influence financial markets, evaluate the intrinsic value of financial assets, assess investment risks, and construct portfolios aligned with investment objectives.

The Chartered Financial Analyst training course provides an intensive introduction to the analytical concepts, valuation techniques, and investment management principles associated with the CFA Programme's body of knowledge. It is designed to strengthen participants' practical financial analysis capabilities and provide a structured foundation for further professional study.

Participants explore financial modelling, investment valuation, quantitative analysis, financial reporting, portfolio management, and professional ethics through practical exercises and investment case studies.

The programme emphasises the application of financial theory to real investment decisions, helping participants develop analytical judgement, interpret market information, and communicate evidence-based investment recommendations.

Professional Problems This Course Is Designed to Solve

• Limited investment analysis capabilities: Developing structured approaches to evaluating financial instruments, market conditions, and investment opportunities.

• Difficulty interpreting financial statements: Applying financial reporting analysis, profitability ratios, cash flow assessment, and financial performance evaluation to investment decisions.

• Weak investment valuation techniques: Using discounted cash flow models, valuation multiples, and fixed-income pricing methods to estimate investment values.

Course content

Why Attend

• Insufficient understanding of financial markets: Strengthening knowledge of economic indicators, market structures, asset classes, and factors influencing asset prices.

• Inadequate investment risk assessment: Applying quantitative measures, diversification principles, and portfolio risk analysis to evaluate investment exposures.

• Poor portfolio construction and evaluation: Understanding asset allocation, portfolio optimisation concepts, performance measurement, and risk-adjusted returns.

• Ethical and professional decision-making challenges: Applying professional conduct principles to investment research, client relationships, conflicts of interest, and financial recommendations.

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

By the end of this course, participants will be able to:

• Explain the structure of financial markets and the roles of major investment instruments

• Apply fundamental quantitative methods to financial and investment analysis

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Course Objectives

- Interpret economic indicators and their implications for investment decisions
- Analyse financial statements and assess corporate financial performance
- Evaluate corporate financing and capital investment decisions
- Apply fundamental equity valuation techniques
- Understand fixed-income pricing, yields, duration, and interest rate risk
- Explain the characteristics and valuation principles of derivatives and alternative investments
- Assess investment risk using statistical and financial measures
- Apply portfolio diversification and asset allocation principles
- Evaluate portfolio performance using risk-adjusted return measures
- Recognise ethical and professional responsibilities in investment analysis and management

Target Audience

This course is suitable for:

- Investment analysts and research professionals
- Portfolio managers and investment associates
- Financial analysts and corporate finance professionals
- Asset management and wealth management professionals
- Banking and financial services specialists
- Equity and fixed-income research analysts
- Risk management and investment risk professionals
- Treasury and capital markets professionals
- Finance graduates pursuing investment management careers
- Professionals preparing for further study within the CFA Programme

Course content

Target Competencies

Participants will develop competencies in:

• Investment and financial market analysis

• Quantitative financial methods

• Economic and macroeconomic interpretation

• Financial statement analysis

• Corporate finance and capital budgeting

• Equity and fixed-income valuation

• Derivatives and alternative investment fundamentals

• Investment risk measurement

• Portfolio construction and performance evaluation

• Investment ethics and professional judgement

Course outline

Day 1: Ethical Standards, Quantitative Methods and Economic Analysis

• Understanding the investment management profession, the structure of the CFA Programme, and the importance of professional competence and ethical conduct

• Exploring the CFA Institute Code of Ethics and Standards of Professional Conduct, including integrity, independence, conflicts of interest, and duties to clients

• Applying time value of money principles, present value, future value, discounting, compounding, and annuity calculations

• Using statistical concepts such as expected returns, variance, standard deviation, covariance, correlation, and probability distributions in financial analysis

• Examining macroeconomic indicators, monetary policy, fiscal policy, inflation, interest rates, exchange rates, and their influence on financial markets

Course content

Course outline

• Practical workshop: Solving quantitative investment problems and analysing the implications of economic developments for financial assets

Day 2: Financial Statement Analysis and Corporate Finance

• Understanding financial reporting principles and analysing the statement of financial position, income statement, and statement of cash flows

• Evaluating corporate profitability, liquidity, solvency, operational efficiency, and financial performance through ratio analysis

• Examining accounting policies, revenue recognition, inventory valuation, depreciation, and financial reporting adjustments that influence investment analysis

• Assessing financial statement quality, earnings sustainability, cash flow generation, and potential financial reporting warning signs

• Applying corporate finance principles covering capital budgeting, financing decisions, capital structure, and weighted average cost of capital

• Practical exercise: Analysing a company's financial statements and preparing a corporate financial assessment with profitability, liquidity, leverage, and investment observations

Day 3: Equity Investments, Fixed Income and Investment Valuation

• Understanding equity market structures, common and preferred shares, equity indices, and fundamental approaches to company analysis

• Applying equity valuation techniques, including dividend discount models, discounted cash flow analysis, and price-based valuation multiples

• Evaluating company fundamentals, earnings expectations, growth assumptions, competitive positioning, and factors influencing intrinsic value

• Understanding fixed-income instruments, bond characteristics, coupon structures, maturity, yield to maturity, and credit quality

• Calculating bond prices and examining the relationships between interest rates, bond yields, duration, and fixed-income price sensitivity

Course content

Course outline

• Valuation workshop: Comparing equity valuation estimates and fixed-income investment opportunities using financial models and market assumptions

Day 4: Derivatives, Alternative Investments and Financial Risk Management

• Understanding derivative instruments, including forwards, futures, options, and swaps, and their applications in hedging and investment strategies

• Examining derivative payoff structures, basic valuation principles, leverage, counterparty exposure, and market risk considerations

• Exploring alternative investments, including real estate, private equity, infrastructure, commodities, and selected investment fund structures

• Assessing investment risks involving market volatility, interest rates, credit quality, liquidity, currency movements, and concentration

• Applying risk measurement techniques, including volatility, correlation, beta, value at risk concepts, and scenario analysis

• Case study: Evaluating a multi-asset investment exposure and recommending appropriate diversification and risk mitigation measures

Day 5: Portfolio Management, Investment Performance and Professional Application

• Understanding portfolio management principles, investment objectives, risk tolerance, investment constraints, and investment policy statements

• Exploring modern portfolio theory, diversification benefits, efficient frontier concepts, and the relationship between expected return and portfolio risk

• Applying asset allocation principles across equities, fixed income, cash, and alternative investments

• Evaluating investment performance using benchmarks, total return, the Sharpe ratio, the Treynor ratio, and Jensen's alpha

• Applying ethical judgement to investment recommendations, research communication, client suitability, performance presentation, and conflicts of interest

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Course outline

• 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

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.

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
Dates on request	Venue on request	Classroom	**Contact us**

Live online option	Online delivery is available at €1,850.-.