

Financial Analysis Workshop – A Hands-On Approach Training

Description

Objectives

- By the end of the program, participants will be able to:
- Apply the framework of financial statements analysis.
- Demonstrate skills at the foundations of ratio and financial analysis.
- Carry out company and industry analysis.
- Implement the process of company evaluation and analysis.
- Analyze real-life financial statements from companies traded on the world and GCC stock exchanges.

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The Contents

Financial Statements and Business Decisions

- Accounting and Financial Systems
- Four Key Financial Statements
- Relationship among the Financial Statements
- Management Uses of Financial Statements
- Essential Notes to the Financial Statements

Financial Statement Analysis: An Introduction

- Role of Financial Reporting and Analysis
- The Core Financial Statements and the Importance of the Annual Report
- The Important Role of Notes and Supplementary Information
- Objective and Types of Audits of Financial Statements
- Financial Statement Analysis Framework
- The Accounting Cycle
- Financial Reporting Mechanics
- Relationship, Elements and Classification of Financial Statements

Financial Reporting Standards

- Importance of Reporting Standards in Security Analysis and Valuation
- The Standards Setting Bodies
- International Financial Reporting Standards versus Generally Accepted Accounting Principles

Understanding Financial Statements

- Income Statement Components
- Revenue and Expense Recognition
- Balance Sheet Components:
- Measurement and Classification
- Cash Flow Statement:
- Operating, Investing, and Financing Activities
- Direct versus Indirect Methods in Cash Flow Preparation

Financial Analysis Techniques

- Ratio Analysis:
- Liquidity: Current, Quick, and Cash Ratios
- Asset Management and Activity Ratios
- Solvency: Debt, Equity, and Times Interest Earned Ratios
- Profitability: Profit Margin, Gross Margin, Return on Assets, Return on Equity
- Market and Valuation: Price-Earnings and Earnings Per Share Ratios
- Vertical Analysis and Strategy: Balance Sheet and Income Statement Approaches
- Trend Analysis and Growth
- DuPont Analysis: The Three-Step and Five-Step Models
- Time-Series and Cross-Sectional Analysis
- Limitation of Ratio Analysis

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Financial Statement Analysis: Applications and Presentations

- Evaluating a Company’s Past Performance
- Comprehensive Real-Life Analysis of Publicly Traded Companies