



**IBS** | معهد الدراسات المصرفية  
INSTITUTE OF BANKING STUDIES

# Investment Analysis

**Dates: 13 – 22 March 2023**

Educational Certification Programs



### **Program Overview:**

The intensive training course integrates practical and theoretical aspects of finance and includes concepts and techniques essential for financial analysis for business. Emphasis is placed upon the underlying principles and practices and how they relate to the decision-making process faced by a financial manager charged with the objective of shareholder wealth maximization. Although this training course emphasizes corporate decision making, the skills obtained will also aid participants in their personal finance and small business decision making.

### **Program Objectives:**

The primary objective of this training course include:

- 1.Explain and evaluate the concept of shareholder wealth maximization and how it relates to other possible objectives of the firm's management.
- 2.Describe the concept of time value of money, risk, and how interest rates are determined.
- 3.Understand the significance of information included in the income statement and balance sheet, discuss the importance of the cash flow statement and explain the difference between accounting net income for the firm and cash flow; analyze a firm's financial performance using financial ratio analysis.
- 4.Explain the concepts of compounding and discounting and utilize these tools to calculate the future value and present value of lump sums, annuities, and uneven cash flow streams and in addition calculate the value of other variables such as the interest rate, time period, and periodic payment.
- 5.Determine the expected rate of return and risk of an individual investment as well as a portfolio of assets, including concepts such as standard deviation, correlation, diversification, and the CAPM (Capital Asset Pricing Model).
- 6.Calculate various measures of project profitability using traditional capital budgeting techniques including Payback Period, Net Present Value, Internal Rate of Return, and Profitability Index.
- 7.Explain the determinants of intrinsic value and utilize these concepts to determine the value and yields of bonds and preferred and common stocks.



## **Program Content:**

### **Introduction to Finance**

- Time Value of Money
- Risk and Return
- Cost of Capital

### **Capital Budgeting**

- Profitability measurement
- Payback period
- SML and CAPM
- NPV and IRR

### **Financial Statement Analysis**

- Financial Statements
- Ratio Analysis
- Horizontal and Vertical Analysis

### **Financial Markets**

- Introduction to Financial Markets
- Bonds Valuation
- Stocks Valuation
- WAAC

## **Program Language:**

The Program material and exams will be provided in English while lectures will be presented in both English and Arabic.

## **Target Audience:**

The program is designed for banking professionals with working in the areas of wealth management, capital markets, treasury, corporate finance, financial planning, credit, risk management, financial management and accounting, audit and compliance, and strategic management.

## **Methods of Training:**

A mix of lectures, discussion, and exercises.



### Duration:

- The Program will be conducted for 36 hours over a period of 2 weeks.
- 3 days a week on Mondays, Tuesday and Wednesday.
- From 8.30am - 3.30pm, including breaks in between.

### Program Schedule:

<i>Week</i>	<i>Day</i>	<i>Date</i>	<i>Remarks</i>
1	13 Mar	Mon.	
1	14 Mar	Tues.	
1	15 Mar	Wed.	
1	19 Mar	Sun.	<b>Mid Term Exam</b> 1:00pm – 2:30pm
2	20 Mar	Mon.	
2	21 Mar	Tues.	
2	22 Mar	Wed.	
28 Mar		Tues.	<b>Final Exam</b> 1:00pm – 3:00pm

**1<sup>st</sup> session: 8.30am - 10.00am**

**1<sup>st</sup> Break: 10.00am-10.30am**

**2<sup>nd</sup> session: 10.30am-12.15pm**

**2<sup>nd</sup> Break: 12.15pm-12.30pm**

**3<sup>rd</sup> session: 12.30pm-1.45pm**

**3<sup>rd</sup> Break: 1.45pm-2.00pm**

**4<sup>th</sup> session: 2.00pm-3.30pm**



### **Punctuality:**

Timeliness is essential and non-adherence will result in the participant being asked to leave the Program.

- 3 late attendances will be recorded as absent for one day.
- 2 days absent during the entire Program and at the discretion of the IBS – the participant will be required to leave the Program.

### **Application Deadline:**

Nomination Forms need to be sent to IBS no later than **Thursday 2 March 2023**.

### **Exam Dates:**

**Midterm Exam: 19 March 2023 (IBS premises)**

**Final Exam: 28 March 2023 (IBS premises)**

### **For further inquiries, please call:**

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