

FINANCE & ACCOUNTING | COURSE BROCHURE

Chartered Financial Analyst

5 days | Classroom training | English

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Course content

Why attend

This course prepares participants for the Chartered Financial Analyst (CFA) designation by covering investment analysis, portfolio management, and ethical standards. It focuses on practical applications of financial theories and tools, enabling professionals to make informed investment decisions and enhance their analytical skills.

Investment professionals face increasing pressure to deliver superior returns while managing risks effectively. The CFA programme equips participants with the skills to analyse financial statements, assess investment opportunities, and construct diversified portfolios. This course addresses the complexities of financial markets, enhancing the ability to interpret data and make informed investment decisions, which is crucial for maintaining a competitive edge in the industry. Participants will engage in practical exercises that simulate real-world investment scenarios, allowing them to apply theoretical knowledge directly to their roles, ultimately leading to improved decision-making and performance in their organisations.
Ethical considerations are paramount in finance, as trust and integrity are essential for client relationships. Participants will engage in real-world scenarios that highlight the importance of ethical standards in investment management. By practising ethical decision-making, participants will develop frameworks to navigate dilemmas, enhancing their credibility and trustworthiness in the eyes of clients and stakeholders. This course will also cover the CFA Code of Ethics and professional conduct, ensuring that participants understand the implications of their decisions. Ultimately, this training will empower professionals to uphold high ethical standards while achieving their financial objectives, fostering long-term success in their careers.

Professional Problems This Course Is Designed to Solve

- Difficulty translating subject knowledge into practical workplace decisions.
- Inconsistent approaches to the activities covered in the course outline.
- Lack of a structured plan for applying and reviewing new skills.

Course methodology

The course employs a blend of case studies, practical exercises, and simulations to build participants' analytical capabilities. Each day includes workshops where participants apply financial models and valuation techniques to real-world scenarios. Participants will produce financial analysis reports, investment proposals, and ethical decision frameworks as evidence of their learning. This hands-on approach ensures that participants can directly apply their knowledge to workplace challenges, reinforcing their understanding of complex financial concepts and ethical standards. Additionally, peer discussions and feedback sessions will facilitate collaborative learning, allowing participants to refine their skills and enhance their professional network. This methodology supports active engagement and practical application of the CFA curriculum.



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Course objectives

By the end of this course, participants will be able to:
• Analyse financial statements to assess company performance and valuation.
• Calculate key financial ratios and metrics for effective investment decision-making.
• Construct diversified investment portfolios based on risk-return profiles and client objectives.
• Evaluate investment opportunities using discounted cash flow analysis and comparative methods.
• Justify ethical investment decisions in line with CFA standards and best practices.
• Compare various asset classes and their impact on overall portfolio performance.
• Develop frameworks for ethical decision-making in complex financial scenarios.
• Present investment research findings effectively to stakeholders and clients.

Target audience

This course is suitable for:
• Investment Analysts - seeking to deepen their analytical skills and knowledge of financial markets.
• Portfolio Managers - aiming to enhance portfolio construction and management techniques.
• Financial Advisors - looking to improve client investment strategies and ethical practices.
• Corporate Finance Professionals - wanting to strengthen their financial analysis and investment evaluation capabilities.

Target competencies

Participants will develop competencies in:
• Financial statement analysis and interpretation.
• Valuation techniques for various asset classes.
• Portfolio management and risk assessment.
• Ethical decision-making in finance.
• Investment research and analysis methodologies.
• Application of financial models in real-world scenarios.

Course outline

Day 1: Foundations of Financial Analysis

Applied activity: Participants will analyse a fictional company's financial statements, calculating key ratios and preparing a brief valuation report using DCF and comparables. They will discuss their findings in small groups to enhance collaborative learning.
Output: A financial analysis report summarising the company's performance and valuation.



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09:00–09:54	Introduction to the CFA programme and its importance in finance.
09:54–10:48	Understanding financial statements: balance sheet, income statement, cash flow statement.
10:48–11:00	Key financial ratios and their implications for investment analysis.
11:00–11:30	**Coffee break**
11:30–12:12	Key financial ratios and their implications for investment analysis. (continued)
12:12–13:06	Overview of valuation methods: DCF, comparables, and precedent transactions.
13:06–14:00	Ethics in finance: an introduction to the CFA Code of Ethics and professional standards.

Day 2: Investment Valuation Techniques

Applied activity: Using a provided case study, participants will perform a DCF analysis and compare it with market multiples to determine the fair value of a fictional tech company. They will present their valuation methods and results to the class.
Output: A valuation report detailing the findings and recommendations, including a presentation.

09:00–09:54	Deep dive into discounted cash flow (DCF) analysis and its components.
09:54–10:48	Comparative valuation techniques: multiples and market analysis for different industries.
10:48–11:00	Asset-based valuation approaches and their applications in real-world scenarios.
11:00–11:30	**Coffee break**
11:30–12:12	Asset-based valuation approaches and their applications in real-world scenarios. (continued)
12:12–13:06	Understanding market efficiency and its implications for valuation accuracy.
13:06–14:00	Case study: Valuing a technology company using multiple methods and presenting findings.

Day 3: Portfolio Construction and Management

Applied activity: Participants will create a diversified investment portfolio for a fictional client based on their risk tolerance and investment goals, using asset allocation strategies discussed in class. They will justify their choices in a group discussion.
Output: A portfolio construction report outlining asset allocation and expected performance metrics.

09:00–09:54	Principles of portfolio theory and the efficient frontier concept.
09:54–10:48	Asset allocation strategies: strategic vs tactical approaches to portfolio management.
10:48–11:00	Risk management techniques in portfolio management, including diversification and hedging.



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11:00–11:30	**Coffee break**
11:30–12:12	Risk management techniques in portfolio management, including diversification and hedging. (continued)
12:12–13:06	Performance measurement and evaluation of investment portfolios using benchmarks.
13:06–14:00	Case study: Constructing a diversified portfolio for a fictional client based on risk tolerance and investment goals.

Day 4: Investment Analysis and Research

Applied activity: Participants will research a specific sector, analyse key indicators, and present potential investment opportunities based on their findings. They will work in groups to enhance collaborative learning and critical thinking.
Output: An investment research presentation summarising the sector analysis and recommendations.

09:00–09:54	Conducting investment research: qualitative vs quantitative analysis techniques.
09:54–10:48	Understanding macroeconomic indicators and their impact on investment decisions.
10:48–11:00	Sector analysis and its relevance to investment strategies and portfolio performance.
11:00–11:30	**Coffee break**
11:30–12:12	Sector analysis and its relevance to investment strategies and portfolio performance. (continued)
12:12–13:06	Evaluating fixed income securities and their role in diversified portfolios.
13:06–14:00	Case study: Researching a specific sector and presenting investment opportunities to stakeholders.

Day 5: Ethics and Professional Standards in Finance

Applied activity: Participants will work in groups to analyse a series of ethical dilemmas faced by finance professionals, developing a decision-making framework to address each scenario. They will present their frameworks to the class for feedback.
Output: A group report outlining ethical frameworks and recommendations for best practices in finance.

09:00–09:54	In-depth exploration of the CFA Code of Ethics and Standards of Professional Conduct.
09:54–10:48	Real-world ethical dilemmas in investment management and their implications.
10:48–11:00	Developing frameworks for ethical decision-making in complex scenarios.
11:00–11:30	**Coffee break**
11:30–12:12	Developing frameworks for ethical decision-making in complex scenarios. (continued)



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12:12–13:06	Case studies of ethical breaches and lessons learned from them.
13:06–14:00	Preparing for the CFA exam: strategies, resources, and study techniques.

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the sessions. They are indicative only and do not constitute a binding commitment.

Dates, venues and fees

Current published course plans. Fees are per participant in GBP, excluding unconfirmed taxes.

Venue	Start date	End date	Fee (GBP)
Dubai Confirmed dates	9 Nov 2026	13 Nov 2026	**£3,150.–**
Online Confirmed dates	9 Nov 2026	13 Nov 2026	**£1,250.–**
Frankfurt Confirmed dates	23 Nov 2026	27 Nov 2026	**£2,650.–**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,250.–**
Kuala Lumpur Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,450.–**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,250.–**
Paris Confirmed dates	14 Dec 2026	18 Dec 2026	**£2,860.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.-**
Istanbul Confirmed dates	11 Jan 2027	15 Jan 2027	**£2,650.-**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**£1,250.-**
Rome Confirmed dates	18 Jan 2027	22 Jan 2027	**£2,450.-**
Online Confirmed dates	18 Jan 2027	22 Jan 2027	**£1,250.-**
Amsterdam Confirmed dates	25 Jan 2027	29 Jan 2027	**£2,540.-**
Online Confirmed dates	25 Jan 2027	29 Jan 2027	**£1,250.-**
Singapore Confirmed dates	8 Feb 2027	12 Feb 2027	**£2,820.-**
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
London Confirmed dates	22 Feb 2027	26 Feb 2027	**£2,450.-**
Online Confirmed dates	22 Feb 2027	26 Feb 2027	**£1,250.-**
Dubai Confirmed dates	8 Mar 2027	12 Mar 2027	**£3,150.-**
Online Confirmed dates	8 Mar 2027	12 Mar 2027	**£1,250.-**
Frankfurt Confirmed dates	22 Mar 2027	26 Mar 2027	**£2,650.-**
Online Confirmed dates	22 Mar 2027	26 Mar 2027	**£1,250.-**
Rome Confirmed dates	29 Mar 2027	2 Apr 2027	**£2,450.-**
Online Confirmed dates	29 Mar 2027	2 Apr 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,450.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,250.-**
Paris Confirmed dates	26 Apr 2027	30 Apr 2027	**£2,860.-**
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**£1,250.-**
Istanbul Confirmed dates	10 May 2027	14 May 2027	**£2,650.-**
Online Confirmed dates	10 May 2027	14 May 2027	**£1,250.-**
Vienna Confirmed dates	17 May 2027	21 May 2027	**£2,940.-**
Online Confirmed dates	17 May 2027	21 May 2027	**£1,250.-**
Amsterdam Confirmed dates	24 May 2027	28 May 2027	**£2,540.-**
Online Confirmed dates	24 May 2027	28 May 2027	**£1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Singapore Confirmed dates	14 Jun 2027	18 Jun 2027	**£2,820.-**
Online Confirmed dates	14 Jun 2027	18 Jun 2027	**£1,250.-**
London Confirmed dates	21 Jun 2027	25 Jun 2027	**£2,450.-**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,250.-**
Dubai Confirmed dates	12 Jul 2027	16 Jul 2027	**£3,150.-**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,250.-**
Barcelona Confirmed dates	19 Jul 2027	23 Jul 2027	**£2,840.-**
Online Confirmed dates	19 Jul 2027	23 Jul 2027	**£1,250.-**
Frankfurt Confirmed dates	26 Jul 2027	30 Jul 2027	**£2,650.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	9 Aug 2027	13 Aug 2027	**£1,450.-**
Online Confirmed dates	9 Aug 2027	13 Aug 2027	**£1,250.-**
Paris Confirmed dates	23 Aug 2027	27 Aug 2027	**£2,860.-**
Online Confirmed dates	23 Aug 2027	27 Aug 2027	**£1,250.-**
Istanbul Confirmed dates	13 Sept 2027	17 Sept 2027	**£2,650.-**
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**£1,250.-**
Amsterdam Confirmed dates	20 Sept 2027	24 Sept 2027	**£2,540.-**
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Cape Town Confirmed dates	27 Sept 2027	1 Oct 2027	**£1,890.-**
Online Confirmed dates	27 Sept 2027	1 Oct 2027	**£1,250.-**
Singapore Confirmed dates	11 Oct 2027	15 Oct 2027	**£2,820.-**
Online Confirmed dates	11 Oct 2027	15 Oct 2027	**£1,250.-**
London Confirmed dates	25 Oct 2027	29 Oct 2027	**£2,450.-**
Online Confirmed dates	25 Oct 2027	29 Oct 2027	**£1,250.-**
Dubai Confirmed dates	8 Nov 2027	12 Nov 2027	**£3,150.-**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**£1,250.-**
Cape Town Confirmed dates	15 Nov 2027	19 Nov 2027	**£1,890.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	15 Nov 2027	19 Nov 2027	**£1,250.–**
Frankfurt Confirmed dates	22 Nov 2027	26 Nov 2027	**£2,650.–**
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,450.–**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,250.–**
Paris Confirmed dates	13 Dec 2027	17 Dec 2027	**£2,860.–**
Online Confirmed dates	13 Dec 2027	17 Dec 2027	**£1,250.–**



Course content

Plan your next step

Dates, availability, exact venue, taxes, inclusions and payment terms require written confirmation. This brochure is not a quotation, registration, booking confirmation or visa invitation. Participants receive a Smart Horizon UK certificate of attendance; programmes are not externally accredited and do not award a professional qualification or designation. Confirm arrangements before booking travel.

For group or in-house training, contact our learning team to discuss your objectives and delivery arrangements.

Contact Smart Horizon

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View the latest course details online