

FINANCE & ACCOUNTING | COURSE BROCHURE

Financial Modelling and Investment Appraisal

5 days | Classroom training | English

SMART HORIZON

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Course content

Why attend

This course equips professionals with essential skills in financial modelling and investment appraisal. Participants will learn to construct robust financial models, evaluate investment opportunities, and make informed financial decisions, enhancing their analytical capabilities and strategic insight in finance-related roles.

Financial modelling and investment appraisal are critical for informed decision-making in finance. Professionals often face challenges in accurately forecasting financial performance and assessing project viability. This course addresses these issues by providing practical skills to build financial models that reflect real-world scenarios, enabling participants to analyse cash flows, assess risks, and justify investment choices effectively. By mastering these techniques, attendees will be better positioned to support their organisations in navigating complex financial landscapes, optimising investment strategies, and enhancing overall financial performance through data-driven insights and robust analysis.
Participants will engage in hands-on exercises that simulate actual financial situations, allowing them to apply theoretical knowledge to practical tasks. They will learn to evaluate investment opportunities using various appraisal methods, including NPV and IRR, and develop the ability to communicate their findings persuasively to stakeholders. By mastering financial modelling techniques and investment appraisal methods, attendees will enhance their ability to analyse financial data, justify investment decisions, and contribute to their organisation's financial strategy. This course prepares professionals to tackle complex financial challenges effectively, ensuring they can make sound investment recommendations that align with organisational goals.

Professional Problems This Course Is Designed to Solve

- Financial models with unclear assumptions or inconsistent structure.
- Investment decisions that overlook sensitivity and uncertainty.
- Difficulty communicating model results and appraisal trade-offs.

Course methodology

The course employs a blend of interactive workshops, case studies, and practical exercises to build financial modelling and investment appraisal skills. Participants will work on real-life scenarios, using spreadsheet software to create financial models and conduct investment analyses. Specific exercises will include building dynamic models, performing sensitivity analyses, and presenting findings to peers. Outputs will include detailed financial models, investment appraisal reports, and presentations that demonstrate their analytical findings and recommendations. This hands-on approach ensures that participants not only learn theoretical concepts but also apply them in a practical context, enhancing their confidence and competence in financial decision-making, while fostering collaboration and critical thinking.



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Course objectives

By the end of this course, participants will be able to:
• Construct a comprehensive financial model for a hypothetical project, demonstrating key assumptions and calculations.
• Evaluate investment opportunities using Net Present Value (NPV) and Internal Rate of Return (IRR) methods, providing clear recommendations.
• Analyse sensitivity and scenario analyses to assess the impact of variable changes on financial outcomes.
• Justify investment decisions based on quantitative analysis and qualitative factors, preparing a persuasive presentation.
• Compare different investment appraisal techniques, identifying their advantages and limitations in various contexts.
• Assess the financial health of a project using key performance indicators (KPIs) derived from the financial model.

Target audience

This course is suitable for:
• Financial Analysts: Enhance skills in financial modelling for investment analysis.
• Investment Managers: Improve decision-making capabilities through rigorous appraisal techniques.
• Business Development Managers: Assess project viability and investment opportunities effectively.
• Corporate Finance Professionals: Strengthen financial forecasting and modelling competencies.

Target competencies

Participants will develop competencies in:
• Developing accurate financial models for diverse scenarios.
• Conducting thorough investment appraisals using multiple techniques.
• Interpreting financial data to inform strategic decisions.
• Communicating complex financial concepts clearly to stakeholders.
• Applying sensitivity analysis to evaluate risk in financial projections.
• Utilising KPIs to monitor project performance and viability.

Course outline

Day 1: Foundations of Financial Modelling

Applied activity: Participants will create a basic financial model for a fictional startup, including revenue projections and cost estimates. They will identify key assumptions and structure the model appropriately, ensuring clarity and accuracy in their calculations.
Output: A foundational financial model spreadsheet with key assumptions, calculations, and a summary of findings.

09:00–09:54	Introduction to financial modelling concepts and best practices in finance.



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09:54–10:48	Overview of financial statements and their interrelationships for modelling.
10:48–11:00	Key assumptions in financial modelling: revenue, costs, and capital structure.
11:00–11:30	Coffee break
11:30–12:12	Key assumptions in financial modelling: revenue, costs, and capital structure. (continued)
12:12–13:06	Building a basic financial model structure in spreadsheet software, including inputs and outputs.
13:06–14:00	Introduction to Excel functions and tools for financial modelling, focusing on practical applications.

Day 2: Investment Appraisal Techniques

Applied activity: Participants will evaluate a proposed investment project using NPV and IRR methods, considering various cost scenarios and revenue projections. They will analyse the results and prepare a summary of their findings and recommendations for stakeholders.
Output: An investment appraisal report with calculations, recommendations, and a clear rationale for the investment decision.

09:00–09:54	Understanding investment appraisal: purpose and importance in project evaluation.
09:54–10:48	Detailed exploration of NPV and IRR calculations, including practical examples.
10:48–11:00	Comparative analysis of payback period and profitability index for investment decisions.
11:00–11:30	Coffee break
11:30–12:12	Comparative analysis of payback period and profitability index for investment decisions. (continued)
12:12–13:06	Introduction to risk assessment in investment decisions, including qualitative and quantitative factors.
13:06–14:00	Real-world case studies of investment appraisal applications to reinforce learning.

Day 3: Advanced Financial Modelling Techniques

Applied activity: Participants will enhance their financial model by incorporating sensitivity analysis to assess the impact of changes in key assumptions on project viability. They will document their findings and prepare to present the results to their peers.
Output: An updated financial model with sensitivity analysis results, documentation, and a summary of key insights.

09:00–09:54	Incorporating advanced Excel functions for financial modelling, including lookups and data tables.
09:54–10:48	Building dynamic models with scenario and sensitivity analysis to assess risk.



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10:48–11:00	Integrating financial statements into a cohesive model for comprehensive analysis.
11:00–11:30	Coffee break
11:30–12:12	Integrating financial statements into a cohesive model for comprehensive analysis. (continued)
12:12–13:06	Forecasting cash flows and understanding working capital requirements for projects.
13:06–14:00	Best practices for model documentation and version control to ensure accuracy and reliability.

Day 4: Evaluating Investment Risks and Returns

Applied activity: Participants will conduct a risk assessment for their financial model, using Monte Carlo simulations to evaluate potential outcomes and risks associated with the investment. They will prepare a report summarising their findings and recommendations for risk mitigation.
Output: A risk assessment report detailing findings, recommendations, and strategies for managing identified risks.

09:00–09:54	Identifying and quantifying investment risks in financial models, including market and operational risks.
09:54–10:48	Using Monte Carlo simulations for risk assessment and understanding variability in outcomes.
10:48–11:00	Understanding the role of qualitative factors in investment decisions and their implications.
11:00–11:30	Coffee break
11:30–12:12	Understanding the role of qualitative factors in investment decisions and their implications. (continued)
12:12–13:06	Developing a risk management framework for projects to mitigate potential issues.
13:06–14:00	Case studies on risk evaluation in investment projects to illustrate best practices.

Day 5: Integrated Financial Analysis and Decision Making

Applied activity: Participants will work in teams to present a comprehensive investment analysis, integrating their financial models and appraisal techniques. They will justify their recommendations to a panel of stakeholders, simulating a real-world investment decision-making environment.
Output: A presentation and detailed investment analysis report, including financial models and justifications for investment decisions.

09:00–09:54	Combining financial modelling and investment appraisal for comprehensive analysis of projects.
09:54–10:48	Preparing and delivering effective presentations of financial findings to stakeholders.
10:48–11:00	Utilising feedback to refine financial models and appraisals for continuous improvement.



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11:00–11:30	**Coffee break**
11:30–12:12	Utilising feedback to refine financial models and appraisals for continuous improvement. (continued)
12:12–13:06	Collaborative decision-making in investment scenarios, emphasising teamwork and communication skills.
13:06–14:00	Final project: integrating all learned skills into a cohesive analysis and presentation.

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.-**
Barcelona Confirmed dates	30 Nov 2026	4 Dec 2026	**£2,840.-**
Online Confirmed dates	30 Nov 2026	4 Dec 2026	**£1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
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.-**
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.-**
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.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,250.–**
Rome Confirmed dates	15 Feb 2027	19 Feb 2027	**£2,450.–**
Online Confirmed dates	15 Feb 2027	19 Feb 2027	**£1,250.–**
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.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Kuala Lumpur Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,450.-**
Online Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,250.-**
Rome Confirmed dates	19 Apr 2027	23 Apr 2027	**£2,450.-**
Online Confirmed dates	19 Apr 2027	23 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.-**
Amsterdam Confirmed dates	24 May 2027	28 May 2027	**£2,540.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	24 May 2027	28 May 2027	**£1,250.–**
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.–**
Cape Town Confirmed dates	28 Jun 2027	2 Jul 2027	**£1,890.–**
Online Confirmed dates	28 Jun 2027	2 Jul 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.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Frankfurt Confirmed dates	26 Jul 2027	30 Jul 2027	**£2,650.-**
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.-**
Cape Town Confirmed dates	16 Aug 2027	20 Aug 2027	**£1,890.-**
Online Confirmed dates	16 Aug 2027	20 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.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
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.-**
Singapore Confirmed dates	11 Oct 2027	15 Oct 2027	**£2,820.-**
Online Confirmed dates	11 Oct 2027	15 Oct 2027	**£1,250.-**
Vienna Confirmed dates	18 Oct 2027	22 Oct 2027	**£2,940.-**
Online Confirmed dates	18 Oct 2027	22 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.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Dubai Confirmed dates	8 Nov 2027	12 Nov 2027	**£3,150.–**
Online Confirmed dates	8 Nov 2027	12 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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