

FINANCE & ACCOUNTING | COURSE BROCHURE

Financial Statement Analysis and Business Performance

5 days | Classroom training | English

SMART HORIZON

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Course content

Why attend

This course provides a comprehensive exploration of financial statement analysis, focusing on interpreting financial data to assess business performance. Participants will develop skills to evaluate financial health, make informed decisions, and enhance strategic planning using analytical tools and frameworks.

Financial statement analysis is crucial for professionals tasked with evaluating a company's financial health and performance. Understanding how to interpret balance sheets, income statements, and cash flow statements enables participants to identify trends, assess risks, and make informed decisions that impact business strategy. This skill set is essential for roles in finance, management, and consultancy, where data-driven insights are key to driving performance and growth. Participants will learn to analyse financial data critically, which is vital for making investment decisions, managing budgets, and ensuring compliance with financial regulations. This course empowers participants to enhance their analytical capabilities, enabling them to support strategic initiatives effectively.
Participants will engage in practical exercises that simulate real-world financial scenarios, enhancing their analytical capabilities. By analysing actual financial statements, they will learn to identify key performance indicators and assess operational efficiency. The course will also cover the use of ratio analysis and benchmarking to compare performance against industry standards, equipping attendees with the tools to present findings effectively to stakeholders. This hands-on approach ensures that participants can apply their learning directly to workplace challenges, improving their ability to support strategic initiatives and drive organisational success. The skills developed will be immediately applicable, enhancing their contributions to their organisations.

Professional Problems This Course Is Designed to Solve

- Difficulty connecting financial statements to operational performance.
- Ratio analysis used without sufficient context.
- Weak identification of financial trends, risks and warning signs.

Course methodology

The course employs a blend of case studies, hands-on workshops, and analytical exercises to build practical skills in financial statement analysis. Participants will work on real-world financial data to perform ratio analysis, trend analysis, and benchmarking. Each session includes group discussions and presentations, allowing participants to share insights and learn collaboratively. The final output will be a comprehensive financial analysis report, synthesising their findings and recommendations based on the data analysed throughout the course. This methodology ensures that participants not only learn theoretical concepts but also apply them in practical contexts, enhancing their problem-solving and decision-making skills in financial contexts.



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Course objectives

By the end of this course, participants will be able to:
• Analyse financial statements to assess a company's performance and financial health.
• Calculate key financial ratios to evaluate operational efficiency and profitability.
• Interpret cash flow statements to understand liquidity and cash management.
• Compare financial performance against industry benchmarks to identify competitive positioning.
• Diagnose financial trends over multiple periods to inform strategic decisions.
• Construct a comprehensive financial analysis report that synthesises findings and recommendations.

Target audience

This course is suitable for:
• Financial Analysts: Responsible for evaluating financial data to guide investment decisions.
• Business Managers: Need to understand financial performance to make strategic operational decisions.
• Accountants: Require skills in analysing financial statements for accurate reporting.
• Consultants: Use financial analysis to advise clients on business performance improvements.

Target competencies

Participants will develop competencies in:
• Ability to interpret financial statements accurately.
• Proficiency in calculating and analysing financial ratios.
• Skill in assessing cash flow and liquidity positions.
• Competence in benchmarking financial performance against industry standards.
• Capability to identify financial trends and their implications for strategy.
• Adeptness in constructing detailed financial analysis reports.

Course outline

Day 1: Introduction to Financial Statements

Applied activity: Participants will review a set of financial statements from a fictional company, identifying key components and terminology. They will discuss their findings in groups, focusing on the relevance of each statement to business performance and decision-making.
Output: A summary report highlighting key components of the financial statements and their implications for business performance.

09:00–09:54	Overview of financial statements: balance sheet, income statement, cash flow statement, and their interrelationships.



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09:54–10:48	Understanding accounting principles and standards (IFRS/GAAP) that govern financial reporting.
10:48–11:00	Identifying key components and terminology in financial reporting for effective analysis.
11:00–11:30	**Coffee break**
11:30–12:12	Identifying key components and terminology in financial reporting for effective analysis. (continued)
12:12–13:06	Introduction to financial analysis concepts, objectives, and their importance in business.
13:06–14:00	Exploring the role of financial statements in business decision-making and strategic planning.

Day 2: Ratio Analysis for Performance Evaluation

Applied activity: Using provided financial statements, participants will calculate and analyse key financial ratios. They will then benchmark these ratios against industry averages and present their findings to the group, discussing implications for strategic decisions.
Output: A presentation summarising the calculated ratios and their implications for the company's financial health.

09:00–09:54	Introduction to financial ratios: liquidity, profitability, efficiency, and solvency ratios and their significance.
09:54–10:48	Calculating and interpreting key financial ratios for performance assessment and decision-making.
10:48–11:00	Understanding the significance of ratio analysis in assessing business performance and operational efficiency.
11:00–11:30	**Coffee break**
11:30–12:12	Understanding the significance of ratio analysis in assessing business performance and operational efficiency. (continued)
12:12–13:06	Benchmarking ratios against industry standards to identify areas for improvement and strategic focus.
13:06–14:00	Limitations and considerations in ratio analysis, including context and industry differences.

Day 3: Cash Flow Analysis and Management

Applied activity: Participants will analyse a cash flow statement from a fictional company, identifying trends and areas for improvement. They will develop strategies to enhance cash flow management based on their analysis and present their recommendations.
Output: A strategic cash flow management plan outlining recommendations for improving liquidity.



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09:00–09:54	Understanding the cash flow statement and its components for liquidity assessment and financial health.
09:54–10:48	Analysing cash flow from operating, investing, and financing activities to understand cash management.
10:48–11:00	Identifying cash flow trends and their impact on liquidity and operational decisions for businesses.
11:00–11:30	**Coffee break**
11:30–12:12	Identifying cash flow trends and their impact on liquidity and operational decisions for businesses. (continued)
12:12–13:06	Assessing the importance of cash management in business operations and strategic planning.
13:06–14:00	Techniques for improving cash flow and liquidity management to enhance financial stability.

Day 4: Trend Analysis and Forecasting

Applied activity: Participants will conduct a trend analysis on selected financial data over three years, identifying key patterns and making forecasts based on their findings. They will present their analysis to the group, discussing implications for future strategy.
Output: A trend analysis report that includes forecasts and strategic recommendations.

09:00–09:54	Understanding the importance of trend analysis in financial performance assessment and strategic planning.
09:54–10:48	Techniques for conducting horizontal and vertical analysis of financial statements to identify trends.
10:48–11:00	Identifying patterns and trends over multiple periods for strategic insights and forecasting.
11:00–11:30	**Coffee break**
11:30–12:12	Identifying patterns and trends over multiple periods for strategic insights and forecasting. (continued)
12:12–13:06	Utilising trend analysis for forecasting future performance and financial planning in business contexts.
13:06–14:00	Integrating trend analysis into strategic business planning and decision-making processes.



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Day 5: Integrated Financial Analysis Project

Applied activity: In groups, participants will conduct a comprehensive financial analysis of a fictional company, integrating all methods learned throughout the course. They will prepare a detailed report and presentation for stakeholders, synthesising their findings and strategic recommendations.
Output: A comprehensive financial analysis report and presentation summarising findings, insights, and strategic recommendations.

09:00–09:54	Bringing together financial statement analysis, ratio analysis, and cash flow management into a cohesive framework for evaluation.
09:54–10:48	Preparing and presenting a comprehensive financial analysis report that integrates all learned methods.
10:48–11:00	Utilising analytical tools for informed decision-making and strategy development in financial contexts.
11:00–11:30	**Coffee break**
11:30–12:12	Utilising analytical tools for informed decision-making and strategy development in financial contexts. (continued)
12:12–13:06	Communicating financial insights effectively to stakeholders and management for strategic alignment.
13:06–14:00	Evaluating the overall financial health of a business based on integrated analysis and findings.

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)
Singapore Confirmed dates	16 Nov 2026	20 Nov 2026	**£2,820.-**
Online Confirmed dates	16 Nov 2026	20 Nov 2026	**£1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
London Confirmed dates	7 Dec 2026	11 Dec 2026	**£2,450.–**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,250.–**
Dubai Confirmed dates	14 Dec 2026	18 Dec 2026	**£3,150.–**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.–**
Frankfurt Confirmed dates	4 Jan 2027	8 Jan 2027	**£2,650.–**
Online Confirmed dates	4 Jan 2027	8 Jan 2027	**£1,250.–**
Rome Confirmed dates	11 Jan 2027	15 Jan 2027	**£2,450.–**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	18 Jan 2027	22 Jan 2027	**£1,450.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	18 Jan 2027	22 Jan 2027	**£1,250.-**
Paris Confirmed dates	1 Feb 2027	5 Feb 2027	**£2,860.-**
Online Confirmed dates	1 Feb 2027	5 Feb 2027	**£1,250.-**
Istanbul Confirmed dates	15 Feb 2027	19 Feb 2027	**£2,650.-**
Online Confirmed dates	15 Feb 2027	19 Feb 2027	**£1,250.-**
Amsterdam Confirmed dates	1 Mar 2027	5 Mar 2027	**£2,540.-**
Online Confirmed dates	1 Mar 2027	5 Mar 2027	**£1,250.-**
Singapore Confirmed dates	15 Mar 2027	19 Mar 2027	**£2,820.-**
Online Confirmed dates	15 Mar 2027	19 Mar 2027	**£1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Cape Town Confirmed dates	22 Mar 2027	26 Mar 2027	**£1,890.–**
Online Confirmed dates	22 Mar 2027	26 Mar 2027	**£1,250.–**
London Confirmed dates	5 Apr 2027	9 Apr 2027	**£2,450.–**
Online Confirmed dates	5 Apr 2027	9 Apr 2027	**£1,250.–**
Dubai Confirmed dates	19 Apr 2027	23 Apr 2027	**£3,150.–**
Online Confirmed dates	19 Apr 2027	23 Apr 2027	**£1,250.–**
Frankfurt Confirmed dates	3 May 2027	7 May 2027	**£2,650.–**
Online Confirmed dates	3 May 2027	7 May 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	17 May 2027	21 May 2027	**£1,450.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	17 May 2027	21 May 2027	**£1,250.–**
Barcelona Confirmed dates	24 May 2027	28 May 2027	**£2,840.–**
Online Confirmed dates	24 May 2027	28 May 2027	**£1,250.–**
Paris Confirmed dates	7 Jun 2027	11 Jun 2027	**£2,860.–**
Online Confirmed dates	7 Jun 2027	11 Jun 2027	**£1,250.–**
Istanbul Confirmed dates	21 Jun 2027	25 Jun 2027	**£2,650.–**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,250.–**
Amsterdam Confirmed dates	5 Jul 2027	9 Jul 2027	**£2,540.–**
Online Confirmed dates	5 Jul 2027	9 Jul 2027	**£1,250.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Singapore Confirmed dates	19 Jul 2027	23 Jul 2027	**£2,820.-**
Online Confirmed dates	19 Jul 2027	23 Jul 2027	**£1,250.-**
Rome Confirmed dates	26 Jul 2027	30 Jul 2027	**£2,450.-**
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**£1,250.-**
London Confirmed dates	2 Aug 2027	6 Aug 2027	**£2,450.-**
Online Confirmed dates	2 Aug 2027	6 Aug 2027	**£1,250.-**
Dubai Confirmed dates	16 Aug 2027	20 Aug 2027	**£3,150.-**
Online Confirmed dates	16 Aug 2027	20 Aug 2027	**£1,250.-**
Frankfurt Confirmed dates	6 Sept 2027	10 Sept 2027	**£2,650.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	6 Sept 2027	10 Sept 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,450.-**
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,250.-**
Vienna Confirmed dates	27 Sept 2027	1 Oct 2027	**£2,940.-**
Online Confirmed dates	27 Sept 2027	1 Oct 2027	**£1,250.-**
Paris Confirmed dates	4 Oct 2027	8 Oct 2027	**£2,860.-**
Online Confirmed dates	4 Oct 2027	8 Oct 2027	**£1,250.-**
Istanbul Confirmed dates	18 Oct 2027	22 Oct 2027	**£2,650.-**
Online Confirmed dates	18 Oct 2027	22 Oct 2027	**£1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Amsterdam Confirmed dates	1 Nov 2027	5 Nov 2027	**£2,540.–**
Online Confirmed dates	1 Nov 2027	5 Nov 2027	**£1,250.–**
Singapore Confirmed dates	15 Nov 2027	19 Nov 2027	**£2,820.–**
Online Confirmed dates	15 Nov 2027	19 Nov 2027	**£1,250.–**
Cape Town Confirmed dates	22 Nov 2027	26 Nov 2027	**£1,890.–**
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**£1,250.–**
London Confirmed dates	6 Dec 2027	10 Dec 2027	**£2,450.–**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,250.–**
Dubai Confirmed dates	13 Dec 2027	17 Dec 2027	**£3,150.–**



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Dates, venues and fees (continued)

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Online Confirmed dates	13 Dec 2027	17 Dec 2027	**£1,250.-**

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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