CFA Program Essentials

14 – 18 February 2027
Amman (Jordan)



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Why This Course

In the global financial industry, the Chartered Financial Analyst CFA designation is the benchmark of excellence for investment professionals.

It demonstrates mastery across key areas of financial analysis, portfolio management, and ethical decision-making — defining the standard for credibility and competence in global finance.

The CFA Program Essentials course provides participants with a rigorous foundation in the CFA curriculum, focusing on practical application, analytical depth, and conceptual clarity.

Through structured learning, case studies, and exam-oriented strategies, this program builds the technical confidence and strategic mindset required to perform at the highest level in both the CFA exams and the professional finance environment.

What You'll Learn and Practice

By joining this program, you will:

- Understand the core structure and philosophy of the CFA Program and its global relevance.
- Build strong proficiency in the ten CFA knowledge domains, including ethics, economics, equity, fixed income, and portfolio management.
- Master quantitative methods, financial reporting, and valuation techniques used by top analysts and investment firms.
- Apply real-world investment analysis, risk evaluation, and portfolio design principles.
- Develop strategic exam preparation skills — time management, question analysis, and performance tracking.
- Strengthen ethical awareness and decision-making aligned with the CFA Institute Code of Ethics and Standards of Professional Conduct.



The Program Flow

Day 1: Introduction to the CFA Framework

- Overview of the CFA Program and its global professional value.
- The ten CFA curriculum domains and their interconnections.
- Ethics and professional standards — the foundation of the CFA Charter.
- The role of the CFA in investment analysis and asset management.
- Case study: Ethical dilemmas in investment decision-making.

Day 2: Quantitative Methods and Economics

- Time value of money, discounted cash flow, and statistical analysis.
- Probability, hypothesis testing, and regression in financial forecasting.
- Core principles of microeconomics and macroeconomics.
- Exchange rates, monetary policy, and global economic trends.
- Workshop: Applying quantitative models to market data.

Day 3: Financial Reporting, Analysis, and Corporate Finance

- Key financial statements and ratio interpretation.
- Earnings quality, valuation ratios, and accounting adjustments.
- Corporate finance fundamentals: capital budgeting, cost of capital, and leverage.
- Dividend policy, working capital management, and corporate governance.
- Hands-on exercise: Building an integrated financial model.

Day 4: Investment Tools and Portfolio Management

- Equity investments — valuation techniques and market efficiency.
- Fixed income — yield curves, duration, and credit analysis.
- Derivatives — options, forwards, and risk management strategies.
- Alternative investments — real estate, private equity, and commodities.
- Case study: Constructing a diversified investment portfolio.

Day 5: Ethics, Review, and Exam Strategy

- Reaffirming ethical standards and professional conduct.
- Integrated case analysis across multiple CFA domains.
- Key exam concepts and high-weighted topics.
- Time management, question interpretation, and mock exam simulation.
- Final workshop: Developing a personalized CFA study and performance plan.



Individual Impact

- Gain deep insight into the principles that drive global financial markets.
- Strengthen analytical and valuation skills essential for investment decision-making.
- Build confidence to excel in the CFA exam through structured preparation.
- Develop a strong ethical foundation to guide professional conduct and trustworthiness.
- Enhance career readiness for roles in investment analysis, portfolio management, and corporate finance.

Work Impact

- Improve analytical accuracy and risk awareness in financial decisions.
- Support data-driven investment and portfolio strategies.
- Elevate organizational credibility through global best practices in financial ethics and governance.
- Enhance research, modeling, and valuation capabilities across teams.
- Contribute to a culture of analytical excellence and professional integrity.

Training Methodology

The course combines concept mastery, applied analysis, and exam-focused training to ensure strong comprehension and performance outcomes.

Learning methods include:

- Guided instruction aligned with CFA curriculum domains.
- Analytical exercises and problem-solving workshops.
- Financial modeling and investment scenario simulations.
- Mock tests and exam-style quizzes for performance tracking.
- Study toolkits with key formulas, summary sheets, and ethical case reviews.

Beyond the Course

Upon completion, participants will possess the knowledge, structure, and discipline required to pursue the CFA designation with confidence and strategic insight.

They will be ready to apply investment principles, analytical frameworks, and ethical leadership in diverse financial roles — from asset management to corporate advisory and research analysis.

