Investment Analysis

26 – 30 September 2027
Tunis (Tunisia)



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Ref: 328840_229895 **Date:** 26 – 30 September 2027 **Location:** Tunis (Tunisia) **Fees:** 4200 GBP

Why This Course

In today's complex financial environment, sound investment decisions demand more than intuition — they require a disciplined understanding of markets, valuation, and risk. Investment Analysis equips participants with the analytical frameworks and decision-making tools used by leading investment professionals to evaluate assets, forecast performance, and construct resilient portfolios.

This program integrates financial theory with practical modeling and market insights, enabling participants to analyze investment opportunities across asset classes — equities, fixed income, real estate, and alternative investments — while balancing risk, return, and strategic objectives.

What You'll Learn and Practice

By joining this program, you will:

- Understand the principles and objectives of modern investment analysis.
- Learn key valuation methods for equities, bonds, and alternative assets.
- Analyze risk, return, and diversification strategies.
- Apply quantitative and qualitative tools for portfolio construction.
- Evaluate macroeconomic and financial indicators that influence investment decisions.
- Develop the ability to communicate investment insights effectively to stakeholders.

The Program Flow

Day 1: Foundations of Investment Analysis

- The role of investment analysis in financial decision-making.
- Understanding asset classes: equities, bonds, and alternatives.
- Risk-return tradeoffs and the concept of market efficiency.
- Case study: evaluating investment strategies during different economic cycles.

Day 2: Equity and Fixed Income Valuation

- Equity valuation techniques: DCF, relative valuation, and multiples.
- Analyzing company financial statements for intrinsic value estimation.
- Bond valuation: yield, duration, and credit risk analysis.
- Workshop: comparing equity vs. bond investment opportunities.



Day 3: Portfolio Theory and Quantitative Tools

- Modern Portfolio Theory MPT and efficient frontier modeling.
- Measuring risk: beta, standard deviation, and Sharpe ratio.
- Portfolio optimization and asset allocation strategies.
- Practical exercise: building a balanced investment portfolio.

Day 4: Alternative Investments and Behavioral Insights

- Real estate, private equity, hedge funds, and commodities.
- Evaluating illiquid and non-traditional assets.
- Behavioral finance: understanding investor biases and decision errors.
- Group project: designing a multi-asset investment portfolio under uncertainty.

Day 5: Performance Evaluation and Future Investment Trends

- Measuring and benchmarking portfolio performance.
- ESG and sustainable investing: integrating environmental and social factors.
- Fintech and digital transformation in investment analysis.
- Action workshop: developing an investment recommendation and presentation.

Individual Impact

- Gain the ability to assess investment opportunities with analytical precision.
- Strengthen financial modeling and valuation skills.
- Build strategic confidence in managing diversified portfolios.
- Develop the capability to align investment strategies with long-term goals.

Work Impact

- Enhance institutional investment performance through structured analysis.
- Strengthen risk management and asset allocation practices.
- Support informed, data-driven investment decisions.
- Foster a disciplined, analytical investment culture within the organization.

Training Methodology

This program blends financial theory, applied analytics, and market simulation to ensure practical relevance and mastery. Learning methods include:

- Interactive valuation and portfolio modeling workshops.
- Real-world case studies from institutional and corporate investors.
- Group projects simulating investment committee presentations.
- Guided exercises using live or historical market data.
- Toolkits and templates for continued use beyond the program.



Beyond the Course

Upon completion, participants will be equipped to analyze, evaluate, and manage investments with professional rigor. They will leave with the frameworks and confidence to interpret financial information, assess market opportunities, and contribute to stronger, more strategic investment decisions across industries and asset classes.

