



Equities Analysis Workshop: A Practical Approach to Modelling and Valuation

12 CPD HOURS

Programme Code: P190215NMF

Course Objectives

Financial modelling involves building a mathematical representation to forecast the performance of a financial portfolio or investment. Equity valuation is used to establish the fair market value for a security.

This module takes participants beyond the basic theoretical valuation methodologies to achieve a holistic understanding of equity valuation and financial modelling.

Key Learning Outcome

At the end of this module, participants will:

- Value a company or investment using a variety of tools
- Use basic financial modelling techniques in Excel
- Understand discounting concepts, cost of capital and discounted cashflow analysis
- Compare and contrast the various forecasting and analysis techniques
- Identify companies before they develop their economic moats and become market leaders
- Analyse sectors and markets that will grow in the next 10 years

Course Outline

What you will learn in this course:

1. Refresher of core concepts
2. Modelling basics
3. Forecasting basics and additional considerations
4. Risk assessment
5. Valuation: Theory vs Practice (reviewed with examples)

Valuation: Theory vs Practice (reviewed with examples)

This interactive section will take the participant through learning points that have been discussed using real-world case studies.



IBF-FTS Funding

This programme is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. For more information please visit [IBF Website](#).

Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS claims may only be made for recognised programmes with specified validity period.

Course Methodology

- Class-based presentation
- Hands-on practice
- Case studies example to reinforce the knowledge taught

Who Should Attend

- Individuals from the Finance Industry
- Trading Representatives
- Research analysts who want to reinforce their learning
- Junior research analysts whom are looking for additional knowledge align with the current industry

Speaker's Profile

Jason Wee, CFA was Head of Research at CLSA, one of Asia's top equities research firms, overseeing the smaller companies research coverage across 11 countries. During his 13-year stint in the stock broking industry, he was consistently ranked top three within his specialty fields, ranging across technology, banking & finance, media, conglomerates and consumer sectors.

His penultimate achievement was the award of top place for research coverage of Asia's smaller companies by investors across all three continents (Asia, Europe, US) in the prestigious Greenwich poll in 2005. Prior to this, Jason was a management consultant with Booz Allen & Hamilton, consulting for multinationals in the steel, financial, oil & gas, information technology and consumer goods industries.

Register your interest today!

For in-house training request, please contact Alson at alson@abmaximus.com.
Competitive corporate discounts available for bulk registration.

Visit <https://www.abmaximus.com/supplementary-cpd-courses> to find out more about
the other courses available.