

# Online Investment Analysis Training Program



Center of  
Learning



# Investment Analysis Training: Moody's Analytics Knowledge Services (MAKS) Advantage

## WE BRING YOU A COMPREHENSIVE SUITE OF BOTH ONLINE AND CLASSROOM-BASED INVESTMENT ANALYSIS TRAINING COURSES.

As a leading provider of high-end research and analytics services to leading investment banks and financial institutions, we have designed our training courses to mimic the real work done at these firms. Whether you are a professional or an undergraduate, masters or MBA student, our courses can provide you with the skills needed to get ahead in the financial services industry. What's more, our 10-day Investment Analysis Classroom Training Program and Online Training Program receives 40 CE credit hours as part of the CFA Institute's® Approved Provider Program.

### SPECIAL FEATURES

- Designed by four former heads of research at leading investment banks
- Taught by finance professionals with extensive industry experience
- Backed by our decade-long experience in training over 5,000 analysts and delivering over 15,000 financial models
- Updated constantly to reflect evolving best practices in the industry
- Packed with practical, hands-on training with case studies and real-life scenarios

## CLASSROOM-BASED AND ONLINE TRAINING

Our classroom-based courses are limited to 10-15 participants to maximize personal attention. Our student-to-instructor ratio is 1:5 compared with >10 at other leading training institutes.

Our online training modules help participants learn at their own pace, anywhere, anytime.

# Our Investment Analysis Online Training Program

OUR COMPREHENSIVE SUITE OF ONLINE TRAINING MODULES COMPRISES INDUSTRY ANALYSIS, FINANCIAL MODELING, VALUATION AND INVESTMENT NOTE WRITING.

Each module is designed to enable you to undergo the investment analysis training in a self-paced and highly interactive online environment to become 'desk ready'. All four modules simulate real-life, on-the-job work using over 600 step-by-step screens.

## HIGHLIGHTS

- 50 hours of intensive investment analysis training
- 20 detailed, real-life case studies covering the entire investment analysis process
- Detailed industry analysis checklists, Excel models (templates + solutions) similar to those used by global investment banks
- Quizzes at critical review points
- Do-It-Yourself exercises and model answers to enhance real-time learning and self-assessment
- Access to our Online Resource Center with ready-to-use Excel/Word-based templates, detailed illustrations, and model answers

Our online training modules are ideal for analysts/aspiring analysts from both the buy-side and the sell-side, captive outsourcing units, KPOs in the financial research space, business analysts, finance professionals, and students aspiring for careers in the capital markets.



# Industry Analysis

Our Industry Analysis training module is based on industry analysis techniques developed by Michael J. Porter and backed by our experience in training over 5,000 investment analysts globally over 10 years.

It captures all the essential elements needed to evaluate the attractiveness of a given industry and uses real-life case studies and industry examples.

## PROGRAM CONTENT

- Analytical tools such as Porter's Five Forces and SWOT to analyze an industry's competitive structure with real examples
- Analysis of the industry profit pool
- Practical methods to evaluate the sustainability of current profitability in the given industry
- Work through various practical exercises followed by detailed model answer discussions
- In-video revision questions

## THIS COURSE WILL ENABLE YOU TO...

- ✓ Understand the competitive forces that shape the profitability of an industry
- ✓ Determine an industry's profit trajectory
- ✓ Understand the impact of endogenous factors such as public policies and regulations on an industry
- ✓ Use our proprietary industry analysis checklist to establish industry attractiveness for potential investors
- ✓ Use techniques to establish a given firm's competitive position within the industry

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# Financial Modeling

Our Financial Modeling training module is designed as a step-by-step learning process to develop earnings forecast models, using detailed earnings model templates on par with those used by global investment banks.

It provides exposure to industry best practices in building earnings models from scratch through a series of closely guided exercises and model answers. The module introduces our 13-step proprietary process to build a detailed model and is filled with practical examples such as how to de-bug and balance a complex model through a series of simple steps.

## PROGRAM CONTENT

- Financial statement analysis
- Identification and integration of key business drivers into forecasting
- Operating leverage and impact on operating margins
- Step-by-step instructions on how to forecast financial statements
- Financial model-building from scratch, using various supporting schedules
- The 'MAKS Method of Balancing the Financial Model'
- Sensitivity analysis for projected financial metrics
- Work through various practical exercises
- In-video revision questions

## THIS COURSE WILL ENABLE YOU TO...

- ✓ Learn how to extract relevant company information from various filings/ subscription data sources
- ✓ Gain in-depth knowledge of best-practice modeling principles and techniques
- ✓ Build a defensible forecast for revenue and cost drivers
- ✓ Build comprehensive financial models from scratch
- ✓ Incorporate sensitivity analysis to arrive at a range of earnings estimates
- ✓ Gain practical experience in designing solutions to real-world financial modeling challenges

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# Equity Valuation

Our Valuation training module is aimed at helping derive an economically sound valuation for a company using both cash flow-based and relative valuation methods. It uses real-life case studies and reflects the best practices adopted by investment analysts worldwide.

More importantly, the module breaks free of rigid and near mechanical valuation approaches to arrive at company valuations that reflect the economic realities the company faces, such as its competitive positioning, industry growth prospects and the re-investment requirements.

## PROGRAM CONTENT

- Step-by-step training to build a robust DCF model
- Steps to recognize and avoid the most common errors in DCF with real examples
- Insights into practical, non-theoretical application of relative valuation (trading comps, deal comps)
- How to select comparables and build dynamic comps models
- Sum-of-the-parts (SOTP) valuation analysis to value a multi-business company
- Apply learning objectives by immediately working on Excel-based, hands-on exercises
- In-video revision questions

## THIS COURSE WILL ENABLE YOU TO...

- ✓ Gain hands-on experience in the most widely used methods of corporate valuation
- ✓ Acquire in-depth knowledge of the impact of different assumptions on company's valuation using sensitivity analysis
- ✓ Gain familiarity with real company valuation
- ✓ Articulate investment recommendations to capital markets participants and internal decision makers more effectively
- ✓ Work on practical exercises from the real world

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# Investment Note Writing

Our Investment Note Writing training module is a comprehensive, one-of-a-kind program aimed at sharpening the ‘persuasive writing’ skills of investment analysts and corporate executives through practical exercises.

The Investment Note Writing module teaches you to apply Logic & Structure principles to effective and convincing writing, based on tenets from Barbara Minto’s Pyramid Principle.

It first establishes the need for a unique investment note write-up. It then addresses the logical thinking and writing parts of the investment note writing process. Finally, it deals with language and writing best practices that help the learner to understand and practice how to write an impactful story in a short and crisp manner.

## PROGRAM CONTENT

- Principles of Logic & Structure, useful in the formulation of a hypothesis-driven argument
- The MECE (mutually exclusive and collectively exhaustive) concept of writing an effective investment thesis
- Sentence construction, flow of thoughts and use of linking words
- ‘MAKS Report Builder’ to write standard sections of an investment report
- Guided writing exercises
- In-video revision questions

## THIS COURSE WILL ENABLE YOU TO...

- ✓ Learn sure-fire methods to build an instant rapport with your readers
- ✓ Use reader’s logic to formulate hypothesis-driven arguments with clear assertion-driven headings
- ✓ Use Logic & Structure to write an effective investment thesis in practice
- ✓ Develop a structured investment thesis using the ‘Pyramid Principle’
- ✓ Learn how the MECE approach can be applied to write better reports
- ✓ Recognize and eliminate common report writing mistakes

**REGISTER NOW**

## Course fees

To enquire about the course fees for our online training modules, please visit <https://elearning.copalamba.com/SearchProgram.htm>

## Register online

For more information about Copal Amba's Online Training Modules or to register, visit <https://elearning.copalamba.com/SearchProgram.htm> or e-mail us at [contact\\_maks@moodys.com](mailto:contact_maks@moodys.com)

### About Moody's Analytics Knowledge Services

We enable organizations to innovate and transform in an ever-changing world. Our global pool of domain experts enables businesses to innovate, scale, and reduce costs. Providing customized solutions is in our DNA – solutions that have a tangible impact on our clients' top-line and bottom-line, enabling them to achieve more with less.

Our clients include leading bulge-bracket financial institutions, asset managers, Fortune 100 corporations, mid-tier companies, boutique investment banks, and funds. We support over 150 institutional clients through our team of 2,600+ employees and our global delivery centers, located in close proximity to our clients.

To learn how we can help you, please email [contact\\_maks@moodys.com](mailto:contact_maks@moodys.com)

[www.maknowledgeservices.com](http://www.maknowledgeservices.com)