



Shree Chanakya Education Society's

**Indira School of Business Studies**

Approved by A.I.C.T.E.

## Management Development Program

**DURATION- 2 Days**

## Equity Research and Valuations

**{Register Online} ([Link](#))**

### **Brief of the Workshop-**

CA students, MBA students and young managers from Finance within an organization < 5 years experience, often stumble on the fundamentals and analysis of equity markets, this program is aimed at students/professionals with basic knowledge of finance, who may require knowledge for growth and explore newer areas within finance. People aspiring to make career in Investment Banks, Financial Modelling, Equity Research, and Private

Equity/Hedge Funds and Financial Research Houses will benefit from the program. As it will enhance your skill set and knowledge which is highly in demand worldwide. The students will increase the employability and stand better chance to get selected in interviews.

People already working in these domains will benefit from the advanced knowledge as the skills gained from the program will help them in promotions and better career prospects.

Is Workshop is for whom-

### **Who should attend?**

CA, MBA students and Finance professionals with < 5 years experience

### **Key Takeaways of the Workshop-**

- Investment Horizon
- Fundamental Analysis
- Industry & Company Analysis
- Financial Statement Analysis
- Ratio Analysis
- Relative Valuation
- Forecasting Techniques
- DCF and Other Valuation methods
- How to write Equity Research Report

### **Workshop Contents-**

#### **Investment Horizon**

- What is Primary Market?
- Difference between Primary and Secondary Market
- Participants in the Securities Markets
- Difference between trading and investing
- Debt and Call money market

#### **Fundamental Analysis**

- What is Fundamental Analysis?
- Difference between Technical and Fundamental Analysis
- Concept of Intrinsic Value
- Importance of Economic Analysis
- Fundamental Analysis Frameworks
- Global and Domestic Economy
- Business Cycles
- Monetary and Fiscal Policies
- Stock Picking Techniques using Growth and Value
- Investing Strategies

#### **Industry & Company Analysis**

- How to analyze an industry
- Michael Porter model for industry analysis
- Industry life cycle and its characteristics
- Industry Analysis Parameters : FMCG ,IT, Cement, Aluminium, Auto , Banking

## Financial Statement Analysis

- Income Statement : Analysis
- Balance Sheet : Analysis
- Footnotes : Analysis
- Cash Flow : Analysis
- Director's report : Analysis
- Management Discussion and Analysis : Analysis
- Auditor's Report : Analysis, Shareholding Pattern : Analysis

## Ratio Analysis

- What is ratio analysis
- How to do common size analysis and what is cross-sectional analysis

## Relative Valuation

- Meaning of Relative Valuation
- How EVA is different from other valuation methods and different Relative Valuation metrics

## Forecasting Techniques

- The Importance of Forecasting in Valuation
- Different Forecasting methods with steps in Forecasting

## DCF and other Valuation methods

- Meaning of intrinsic value
- Difference in FCFF and FCFE
- Steps in DCF Modelling and how to calculate Cost of Debt and Cost of Equity

## How to write Equity Research Report

- Equity Research Process
- Steps in writing Equity Research Report
- & Loss statement and Cash Flow statement
- Finance and Accounting: Connection
- Objective of corporate financial management
- Finance functions
- Financial assets and markets
- Risk-return relationship

## Methodology of the Workshop-

Adult Learning Principles - Experiential learning (learning by doing), short presentations, case studies, simulations and exercises.

## Trainer Details: - Mr. Srinivas

- An Engineer, MBA, Advanced Financial Management (IIM-Ahd), AMP (Harvard) is working in a leading Billion dollar corporate as President -M&A
  - On academic advisory board of 3 leading B schools in India (Top 50 ranked)
  - Have hands on experience in implementing complex financial ratios like EVA at floor level.
  - Trained over 4000+ executives in leading corporate like L&T, Piramals etc and over 2000+MBA students across 8 business schools in Mumbai and Pune
- Facilitator would be assisted by 2 faculties. One is a CA with 14 years experience, was head of Finance in a leading software company and now is a full time training consultant. The 2<sup>nd</sup> faculty is an MBA and worked as senior research analyst with leading brokerage companies like Angel broking, Edelweiss and currently is a training consultant with Equatorials- Firm specializing in training for finance professionals.

## Program Fees:-

Duration	Venue	Fees	Early Bird Offer
2 Days	ISBS	Rs.6,000/-	Rs.5,400/-

**Early Bird Offer: -** Registration 20 days before the program

**Certification Program**

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