

Course Overview:

This 3-day training course is designed for professionals involved in evaluating investment opportunities, supporting capital allocation decisions, or assessing financial viability in a corporate context. The program bridges foundational investment knowledge with practical portfolio management strategies. By enhancing financial evaluation skills and aligning them with decision-making frameworks, participants will gain the competence to interpret financial data, assess risk-return profiles, and contribute to value-driven investment and procurement decisions across industries.

Course Objective:

By the end of this program, participants will be able to:

1. Understand the core principles of investment analysis and financial markets.
2. Evaluate financial stability using fundamental investment metrics.
3. Analyze and compare various financial instruments.
4. Apply portfolio management techniques to internal investment decisions.
5. Support cross-functional teams in project feasibility and risk assessments.

Course Outline:

Day 1: Fundamentals of Investment

1. Introduction to Investment Concepts
 - What is investment and why it matters
 - Types of investments: equity, debt, alternatives
 - Time value of money and compounding principles
2. Understanding Financial Markets
 - Capital markets vs. money markets
 - Role of investors, institutions, and regulators
 - Economic indicators and market trends
3. Basic Financial Instruments
 - Bonds, stocks, and mutual funds explained
 - Key terms: yield, coupon, duration, NAV
 - Risks and returns of different instruments

Day 2: Evaluating Investment Opportunities

4. Financial Statement Analysis for Investment
 - Key financial ratios and what they reveal
 - Liquidity, profitability, solvency indicators
 - Red flags in financial health
5. Investment Appraisal Techniques
 - NPV, IRR, payback period, and profitability index
 - Cost-benefit analysis for project decisions
 - Sensitivity and scenario analysis
6. Risk and Return Assessment
 - Types of investment risk
 - Risk-return tradeoff in business contexts
 - Diversification and correlation

Day 3: Portfolio and Strategic Investment Management

7. Principles of Portfolio Management
 - Asset allocation strategies

Training Language:

English

Training Methodology:

The course combines various teaching methods, including instructor-led presentations, group discussions, case study analyses, and assessments through quizzes and a final exam to engage participants and ensure they understand and retain the material.

Venue | Date | Fees

Riyadh | 31-08-2025 | 10,350 SAR

- Portfolio balancing and rebalancing
- Aligning investments with organizational strategy

8. Investment Case Studies

- Case study: Evaluating supplier financial stability
- Case study: Internal project investment decisions
- Lessons learned and best practices

9. Integrating Investment Insight into Business Strategy

- Investment mindset in strategic decisions
- Collaboration across finance, procurement, and project teams
- Stakeholder engagement and alignment

Who Should Attend:

- Procurement officers involved in supplier evaluation
- Financial analysts and investment support staff
- Project evaluators and decision-making advisors
- Professionals engaged in capital projects and feasibility assessments