COURSE OVERVIEW FM0683-3D
Strategic Investment Management

H-STK© INCLUDED

Course Title
Strategic Investment Management

Course Date/Venue
Session 1: August 02-04, 2026/Tamra Meeting Room, Al Bandar Rotana Creek, Dubai, UAE
Session 2: November 01-03, 2026/Sur Meeting Room, Royal Tulip Muscat, Muscat, Oman

1.8 CEUs (18 PDHs) AWARD

Course Reference
FM0683-3D

Course Duration/Credits
Three days/1.8 CEUs/18 PDHs

Course Description

This practical and highly-interactive course includes various practical sessions and exercises. Theory learnt will be applied using the "MS Excel" application.

This course is designed to provide participants with a detailed and up-to-date overview of Investment Fundamentals & Financial Analysis. It covers the types of investment and its importance in personal and corporate finance; the financial markets, asset classes and investment instruments and investment objectives and constraints; the time value of money (TVM) covering present value and future value, annuities and perpetuities, compounding frequency and discounting techniques; the basics of financial statements, fundamentals of equity investment and bond and fixed income securities; and the fundamental analysis, technical analysis, stock valuation methods and bond valuation techniques.

During this interactive course, participants will learn the modern portfolio theory (MPT), efficient frontier and diversification, strategic versus tactical allocation and role of asset correlation; the risk and return analysis, active and passive investing, behavioral finance insights, investment strategies overview and portfolio performance evaluation; the financial ratio analysis, cash flow analysis, valuation, capital budgeting techniques and scenario and sensitivity analysis; the forecasting and financial modeling, personal investment planning and corporate investment decisions; and ESG and sustainable investing and ethics in investment management.

Course Objectives/Outcomes & Benefits for the Participants

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain a fundamental knowledge on investment and financial analysis
- Discuss the types of investment and its importance in personal and corporate finance
- Recognize financial markets, asset classes and investment instruments and investment objectives and constraints
- Explain time value of money (TVM) covering present value and future value, annuities and perpetuities, compounding frequency and discounting techniques
- Illustrate the basics of financial statements, fundamentals of equity investment and bond and fixed income securities
- Apply fundamental analysis, technical analysis, stock valuation methods and bond valuation techniques
- Discuss modern portfolio theory (MPT), efficient frontier and diversification, strategic versus tactical allocation and role of asset correlation
- Carryout risk and return analysis, active and passive investing, behavioral finance insights, investment strategies and portfolio performance evaluation
- Employ financial ratio analysis, cash flow analysis, valuation, capital budgeting techniques and scenario and sensitivity analysis
- Illustrate forecasting and financial modeling, personal investment planning, corporate investment decisions, ESG and sustainable investing and ethics in investment management

Exclusive Smart Training Kit - H-STK®

*Participants of this course will receive the exclusive "Haward Smart Training Kit" (**H-STK®**). The **H-STK®** consists of a comprehensive set of technical content which includes **electronic version** of the course materials conveniently saved in a **Tablet PC**.*

Who Should Attend

This course provides an overview of all significant aspects and considerations of investment fundamentals and financial analysis for new or aspiring investors, finance and accounting professionals, banking and financial services staff, business owners and entrepreneurs, corporate executives and managers and those who want to build or strengthen their understanding of investment principles, financial markets, and analytical tools.

Course Fee

US$ 3,750 per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

Accommodation

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

Course Certificate(s)

Internationally recognized certificates will be issued to all participants of the course who completed a minimum of 80% of the total tuition hours.

Certificate Accreditations

Haward's certificates are accredited by the following international accreditation organizations:

- British Accreditation Council (BAC)

  Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. Haward's certificates are internationally recognized and accredited by the British Accreditation Council (BAC). BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

- The International Accreditors for Continuing Education and Training (IACET - USA)

  Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

  Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units** (CEUs) in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

  Haward Technology Middle East will award **1.8 CEUs** (Continuing Education Units) or **18 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.

Course Instructor(s)

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:

Mr. Pan Kidis, MBA, BSc, is a **Senior Management Consultant** with over **30 years** of extensive experience in **Project Scheduling & Cost Control**, **Project Planning, Scheduling & Cost Control Professional**, **Production Planning & Scheduling**, **Administration** Skills, **Office Management** Skills, **Survey** Skills, **Interviewing** Skills, **Interpersonal** Skills, **Communication** Skills, **Negotiation** Skills, **Presentation** Skills, **Manager** Skills, **Supervisory & Management** Skills, **Counselling** Skills, **Leadership** Skills, **Office Management**, **Code of Conduct**, **Train the Trainer**, **Logistics & Transportation Planning** Methods, **Forecasting Logistics** Demands, Visual Network Model, **Logistics Operations**, **Strategic Transport Planning**, **Transport** System, **Fleet Planning**, Routing & Scheduling, **Transport** Cost Concepts & Elements, Costing Vehicles & Trips, Tariff Fixing, **Supply Chain & Operations** Management, **Logistics & Production** Planning, **Cost Reduction** Techniques, **Inventory** Management, **Business Analysis**, **Risk** Management, **Production** Management, **Warehouse** Management, **Production Planning, Material Requirement Planning**, **Budgeting**, Production & Shop Floor Scheduling, **Cost Analysis**, **Database** Design & Implementation, **Business Administration, Production Data** Acquisition & Analysis, Industrial **Logistics**, Process Improvement, Team Leadership & Training, Textile Manufacturing, Staff Reduction, **Warehouse** and **Shipping**. Further, he is also well-versed in **Cash Flow** Management, **Decision Making** Techniques, Production & Product Inventory Control, **Inventory** Analysis Tools, **Stock Management** Techniques, Material Handling, Process Improvement & Equipment Selection, **Costing & Budgeting**, Wastewater Treatment Plant Monitoring & Control, Volume Tank Measurements, Data Acquisition and Energy Conservation. He is currently the **Business Analyst** of Diasfalisis Ltd. wherein he is responsible in the design of the proposed business model and develop and evaluate new applications.

Mr. Kidis had occupied several significant positions as the **Supply Chain Manager**, **Production Planning & Logistics Manager**, **Purchasing Office Manager**, **Project Manager**, **Assistant Dyeing Manager**, **Production Supervisor**, **Production Coordinator** and Design & Analysis Intern for various international companies such as the Hellenic Fabrics, **AKZO Chemicals Ltd.** and **EKO Refinery** and Greek Navy Force.

Mr. Kidis has a **Master** degree in **Business Administration** from the **University of Kent**, **UK** and a **Bachelor** degree in **Chemical Engineering** from the **Aristotle University of Thessaloniki**, **Greece**. Further, he is a **Certified Instructor/Trainer**, a **Certified Internal Verifier/Assessor/Trainer** by the **Institute of Leadership & Management** (**ILM**) and has delivered numerous trainings, courses, workshops, seminars and conferences internationally.

Training Methodology

All our Courses are including **Hands-on Practical Sessions** using equipment, State-of-the-Art Simulators, Drawings, Case Studies, Videos and Exercises. The courses include the following training methodologies as a percentage of the total tuition hours:-

30% Lectures
20% Practical Workshops & Work Presentations
30% Hands-on Practical Exercises & Case Studies
20% Simulators (Hardware & Software) & Videos

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons.

Learning Design & Customization

This course can be customized to the exact requirements of clients. Haward Technology is so proud of our huge capabilities in tailoring our courses to the training needs of our valued clients.

Course Program

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

Day 1

0730 – 0800	*Registration & Coffee*
0800 – 0815	*Welcome & Introduction*
0815 – 0830	***PRE-TEST***
0830 – 0900	***Introduction to Investment*** *Definition & Types of Investments • Importance of Investment in Personal & Corporate Finance • Risk-Return Tradeoff • Investment Decision-Making Process*
0900 - 0930	***Overview of Financial Markets*** *Primary versus Secondary Markets • Capital Markets versus Money Markets • Role of Stock Exchanges • Regulatory Bodies & Frameworks*
0930 – 0945	*Break*
0945 – 1000	***Asset Classes & Investment Instruments*** *Equities, Bonds, Real Estate & Commodities • Mutual Funds & ETFs • Derivatives (Options & Futures) • Cash & Equivalents*
1000 – 1030	***Investment Objectives & Constraints*** *Return Requirements • Risk Tolerance • Liquidity & Time Horizon • Legal & Tax Considerations*
1030 – 1100	***Time Value of Money (TVM)*** *Present Value & Future Value • Annuities & Perpetuities • Compounding Frequency • Discounting Techniques*
1100 – 1130	***Basics of Financial Statements*** *Balance Sheet Structure • Income Statement Fundamentals • Statement of Cash Flows • Interpreting Financial Disclosures*

1130 - 1200	***Fundamentals of Equity Investment*** *Common versus Preferred Stock • Earnings per Share (EPS) • Dividend Policies • Stock Valuation Basics*
1200 - 1230	***Bond & Fixed Income Securities*** *Types of Bonds & Their Features • Bond Yields & Pricing • Interest Rate Risk & Duration • Credit Ratings & Default Risk*
1230 - 1245	*Break*
1245 - 1330	***Fundamental Analysis*** *Qualitative versus Quantitative Analysis • Industry & Company Analysis • Economic Indicators • SWOT Analysis*
1330 - 1420	***Technical Analysis*** *Price Trends & Chart Patterns • Support & Resistance Levels • Moving Averages & Oscillators • Volume & Momentum Indicators*
1420 – 1430	***Recap*** *Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow*
1430	*Lunch & End of Day One*

Day 2

0730 – 0830	***Stock Valuation Methods*** *Dividend Discount Model (DDM) • Price/Earnings (P/E) Ratio • Free Cash Flow to Equity (FCFE) • Relative Valuation Metrics*
0830 – 0930	***Bond Valuation Techniques*** *Present Value of Cash Flows • Yield to Maturity (YTM) • Yield Spread Analysis • Duration & Convexity*
0930 - 0945	*Break*
0945 – 1000	***Portfolio Theory & Asset Allocation*** *Modern Portfolio Theory (MPT) • Efficient Frontier & Diversification • Strategic versus Tactical Allocation • Role of Asset Correlation*
1000 – 1030	***Risk & Return Analysis*** *Systematic versus Unsystematic Risk • Beta, Alpha & Standard Deviation • Sharpe & Treynor Ratios • Risk-Adjusted Return Metrics*
1030 – 1100	***Active versus Passive Investing*** *Index Funds & ETFs • Active Fund Management Styles • Cost Considerations • Benchmark Tracking*
1100 – 1130	***Behavioral Finance Insights*** *Common Investor Biases • Herd Behavior & Overconfidence • Framing & Loss Aversion • Impact on Investment Decisions*
1130 - 1200	***Investment Strategies Overview*** *Growth versus Value Investing • Income Investing • Momentum & Contrarian Strategies • Dollar-Cost Averaging*
1200 - 1230	***Portfolio Performance Evaluation*** *Setting Benchmarks & Goals • Performance Attribution • Risk versus Return Analysis • Portfolio Rebalancing*
1230 – 1245	*Break*
1245 – 1330	***Financial Ratio Analysis*** *Liquidity Ratios (Current, Quick) • Solvency Ratios (Debt/Equity, Interest Coverage) • Profitability Ratios (ROA, ROE, Margin) • Efficiency Ratios (Inventory Turnover, Asset Turnover)*

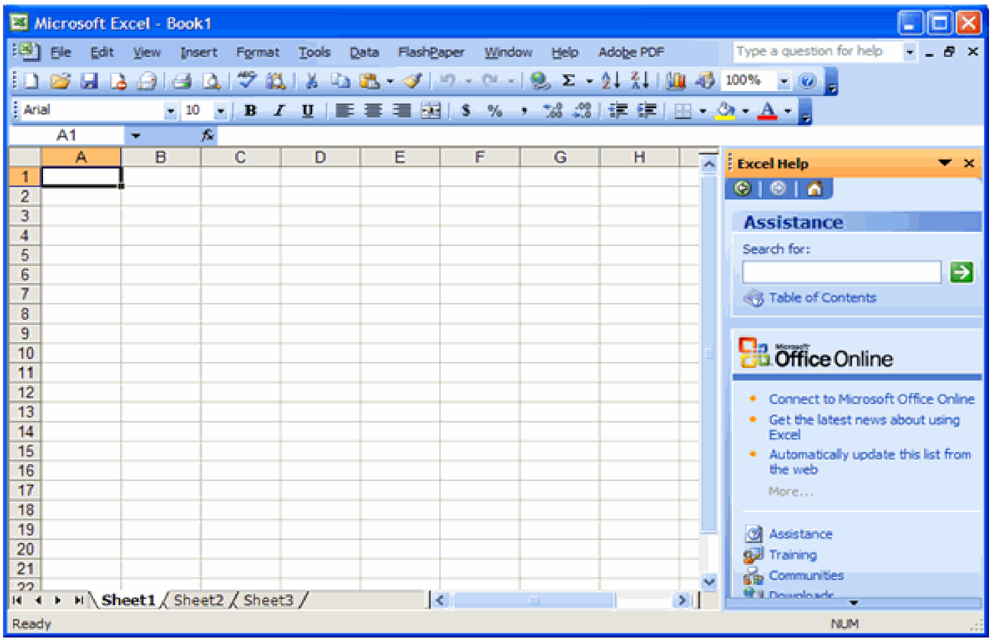
1330 - 1420	***Cash Flow Analysis*** *Operating, Investing & Financing Cash Flows • Free Cash Flow Calculation • Cash Flow-Based Valuation • Importance in Financial Health*
1420 – 1430	***Recap*** *Using this Course Overview, the Instructor(s) will Brief Participants about the Topics that were Discussed Today and Advise Them of the Topics to be Discussed Tomorrow*
1430	*Lunch & End of Day Two*

Day 3: **Wednesday, 10th of September 2025**

0730 – 0830	***Cost of Capital Concepts*** *Weighted Average Cost of Capital (WACC) • Cost of Equity versus Debt • CAPM Model • Importance in Valuation*
0830 - 0930	***Capital Budgeting Techniques*** *Net Present Value (NPV) • Internal Rate of Return (IRR) • Payback Period • Profitability Index*
0930 – 0945	*Break*
0945 – 1000	***Scenario & Sensitivity Analysis*** *Purpose & Applications • Base Case versus Best/Worst Case • Sensitivity Tables • Use in Investment Planning*
1000 – 1030	***Forecasting & Financial Modeling Basics*** *Revenue Projections • Operating & Capital Expenditure Forecasting • Pro Forma Statements • Basic Spreadsheet Modeling Tools*
1030 – 1100	***Personal Investment Planning*** *Setting Financial Goals • Retirement & Education Planning • Insurance & Emergency Funds • Asset Allocation by Life Stage*
1100 – 1130	***Corporate Investment Decisions*** *Strategic Investments • Working Capital Investment • Mergers & Acquisitions (M&A) • Impact on Shareholder Value*
1130 - 1200	***ESG & Sustainable Investing*** *Environmental, Social & Governance (ESG) Criteria • Socially Responsible Investing (SRI) • ESG Rating Agencies • Green Bonds & Impact Investing*
1200 - 1230	***Ethics in Investment Management*** *Code of Ethics & Fiduciary Duty • Insider Trading & Conflicts of Interest • CFA Institute Standards • Corporate Governance Practices*
1230 – 1245	*Break*
1245 – 1345	***Case Study: Portfolio Analysis*** *Diversified Portfolio Breakdown • Asset Correlation Analysis • Portfolio Rebalancing Decision • Risk & Return Simulation*
1345 – 1400	***Course Conclusion*** *Using this Course Overview, the Instructor(s) will Brief Participants about the Course Topics that were Covered During the Course*
1400 – 1415	***POST TEST***
1415 – 1430	*Presentation of Course Certificates*
1430	*Lunch & End of Course*

Simulator (Hands-on Practical Sessions)

Practical sessions will be organized during the course for delegates to practice the theory learnt. Delegates will be provided with an opportunity to carryout various exercises using “MS-Excel” application.



MS-Excel

Course Coordinator

Mari Nakintu, Tel: +971 2 30 91 714, Email: mari1@haward.org