

COURSE OVERVIEW FM0087

Investment Fundamentals & Financial Analysis

Course Title

Investment Fundamentals & Financial Analysis

Course Date/Venue

October 20-24, 2025/Fujairah Meeting Room,
Grand Millennium Al Wahda Hotel, Abu Dhabi,
UAE

Course Reference

FM0087

Course Duration/Credits

Five days/2.75 CEUs/27.5 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 financial and investment practices. It covers the factors influencing investments by firms including interest rates, economic growth, inflation, productivity of capital, wage costs and depreciation; the types of financial investments as well as shares, bonds, treasury bills, annuities, certificate of deposit and collateralized debt obligations; and the financial markets, exchanges, stock market, bond market, forex market, derivatives market, money market, commodity market, spot market and real estate market.



During this interactive course, participants will learn the types of investment strategies covering passive and active strategies, growth investing, value investing, income investing, dividend growth investing, contrarian investing and indexing; the methods of property investment management, real estate investments, real estate trading and investment management through real estate investment trusts; the types of companies and stocks and their selection process including growth companies, defensive companies, cyclical companies, and speculative companies; the global bond markets and the factors influencing pension plan investments; the steps in investment performance measurement; and the benchmark selection, calculation of the portfolio's excess return, performance attribution and risk analysis.



Course Objectives

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

- Apply and gain an in-depth knowledge on finance and investment practices
- Discuss the factors influencing investments by firms including interest rates, economic growth, inflation, productivity of capital, wage costs and depreciation
- Recognize the types of financial investments as well as shares, bonds, treasury bills, annuities, certificate of deposit and collateralized debt obligations
- Determine financial markets, exchanges, stock market, bond market, forex market, derivatives market, money market, commodity market, spot market and real estate market
- Identify the types of investment strategies covering passive and active strategies, growth investing, value investing, income investing, dividend growth investing, contrarian investing and indexing
- Carryout various methods of property investment management, real estate investments, real estate trading and investment management through real estate investment trusts
- Recognize the types of companies and stocks and their selection process including growth companies, defensive companies, cyclical companies and speculative companies
- Discuss global bond markets and the factors influencing pension plan investments
- Apply the steps in investment performance measurement, benchmark selection, calculation of the portfolio's excess return, performance attribution and risk analysis

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

The course is intended for bankers, investment bankers, export credit agency officers, multi-lateral lenders, fund and asset managers including for funds investing in real estate, private equity, equity and distressed debt. It is also beneficial for those investors including shari’ah compliant investors, real estate professionals, private equity professionals, treasurers and corporate finance professionals, entities involved in asset securitizations, special operations officers including bankruptcy and work-out officers.

This course is also intended for project, infrastructure and real estate developers, government agency officers associated with project, infrastructure, developments, construction contractors, equipment suppliers, oil and gas, petrochemical, electricity and other professionals, insurers, finance lawyers and accountants.

Course Fee


US\$ 5,500 per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

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

Certificates are accredited by the following international accreditation organizations: -

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British Accreditation Council (BAC)

Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. 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.

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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 **2.75 CEUs** (Continuing Education Units) or **27.5 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. Lionel Perry, FFA FIPA, CA, CFE, MSc, BSc, is a **Senior Financial & Accounting Management Expert** with almost **35 years** of extensive experience within **Oil & Gas, Petrochemical, Refinery, Power & Water Utilities, Other Energy** Sectors and **Financial** industries. His vast experience widely covers in the areas of **Financial Analysis** Techniques, **Financial Analysis**, Evaluation & Budgeting, **Financial Analysis, Legal Translation, Legal Documentation** Processes and Procedures, **Contract and Legal** Document Drafting, **Contract Negotiation and Legal Perspective, Legal Compliance and Corporate Governance**, Budgeting & Feasibility Study, **Financial & Accounting** Management, **Financial Accounting** Principles, **Accounting** Principles & Framework, **Accounting** Policy Framework, **Accounting & Financial** Strategy, **Contract** Management, **Contract Negotiation, Contract** Management & Tendering, **Contract & Risk** Management, **Accounting & Performance** Measurement, **Budgeting, Accounting & Cost** Control, **General Accounting, Control & Internal Auditing**, Operational & **Financial Auditing, Finance & Accounting** Principles, **Fund & Accounting** Procedures, Advanced **Consolidation & Financial** Reporting, **Financial Statements** Review, **Accounts Payable** Management, **Accounts Payable GAAP** (Generally Accepted Accounting Principles), **Accounts Payable** Principles & Guidelines, **Accounts Payable & Disbursements, Accounts Payable** Best Practices, **Accounts Payable** Planning & Organising, **Accounts Receivable & Accounts Payable (AR/AP)** Process, **VAT** Reclaim & Refunds Procedures, **VAT** for Financial Services & Insurance, **VAT** Fraud Detection, Prevention & Penalties, Effective **VAT** Auditing Techniques, **VAT** Implication in Mergers & Acquisition, **VAT** for Importers & Exporters, Global Perspective of **VAT** on Digital Platforms, **Tax Law, Accounting** Information Systems, **Accrual Accounting** System, **Accrual Basis** of **Accounting** for Governments & Government Entities, **Fraud Investigations & Forensic Accounting, Finance & Accounting** Operations, **Finance** Management & Operations, **Accounting** Policies on Plant & Equipment, **Lease, Expense** Recognition, **Provisions & Liabilities, Cash & Revenue** Recognition, **Accounting** of Heritage Assets, **Project Accounting**, Petroleum Advanced **Budgeting & Forecasting, Budgeting & Reporting, Strategic** Planning Process, **Budgeting** Best Practices, **Budgetary** Controls, Effective **Purchasing** Skills, **Purchasing** Methods, **Procurement** Strategies, **Contract Purchasing, Vendor & Supplier** Management, **Negotiation** Skills, **Supplier** Performance Monitoring, **Purchasing** Strategy & Planning, **Inventory** Planning & Control, **Change** Management, **HR** Management, **Supply Chain** Management, Revenue Recognition, **Materials Inventory** Planning, **Forecasting** Evaluation, **Materials** Management, **Materials** Identification, **Stock** Identification Systems, **Inventory** Accuracy, **Materials** Spare Analysis, **Stock** Disposal, **Materials** Management, **Inventory** Control Management, **Vendor** Selection Process, **Project** Management, **Procurement & Purchasing** Management, **Quality Assurance** in **Accounting** Policy, **Qualitative & Quantitative** Research Methods, **Managing** Tenders & Specifications, **Tendering & Bidding** Evaluation, Identification of **Potential Bidders & Selection** Criteria, **Supply Chain** Management, Strategic Thinking & Planning, **Logistics** Operations & **Warehouse** Management, **Warehouse** Store & **Inventory** Control, **Transport** Management & Planning, **Logistical & Transportation** Planning Methods, **Inventory** Management & Forecasting Techniques, **Stock** Control, **Procurement** Best Practices, Advanced **Procurement Tools & Techniques, Shipping & Distribution** Management, **Outsourcing** Strategy, Incoterms, Bill of Lading Fundamentals and Export Documentation. He is currently the **Partner/Owner & Director** of **Accountancy & Consultancy** in **The Netherlands** wherein he has wide range of engagements in financial and accounting management, tax law, accounting information systems, auditing of various international organizations including fraud investigations, internal, operational and financial auditing in accordance with International Financial Reporting Standards (**IFRS**) and International Public Sector Accounting Standards (**IPSAS**).

During his career life, Mr. Perry has gained his academic and field experience through his various significant positions and dedication as the **Finance & Operations** Director, **Financial** Manager, **Accounts Payable** Manager, **Financial** Controller, **Chairman** of the **Committee**, **Financial** Expert, **Financial** Analyst, **VAT** Specialist, **VAT** Compliance Officer, **VAT** Advisor, **Quality** Manager, **Audit** Manager, **Project** Manager, **Newsletter** Editor, **Team** Leader, **Audit** Supervisor, **Auditor**, **Audit** Consultant, **Treasurer**, **Accounting** Assistant, **Advisor**, **Advisor** of the **Dean**, **Corrector**, **IPSAS** Consultant, **Speaker/Developer/Facilitator**, **Lecturer**, **Coach**, **Mentor** and **Senior** Instructor/Trainer from the various international universities, world banks, governments and oil and gas consultancy engineering companies such as the Blackstone Interim Management Ltd., IASeminars Ltd., Foundation Surinamese Museum, Zuiverloon Ltd., Dalstaete Accountants, Deloitte Accountants, Masman Bosman Accountants, Suriname Accountants & Business Consultants, Tjong A Hung Accountants, Ministry of Education & Sciences, NCOI, Ichthus University of Rotterdam, Erasmus University of Rotterdam, Anton de Kom University, National Deforestation & Timber Co., Dutch Ministry of Foreign Affairs, Technical Centre for Agricultural & Rural Cooperation and Asian Development Bank (ADB).

Mr. Perry has a **Master's** degree in **Economics, Tax Law, Financial Accounting & Accounting Information Systems** and a **Postgraduate** degree in **Accounting** from the **University of Amsterdam, The Netherlands**. Further, he is a **Chartered** Accountant, a **Certified** Fraud Examiner, a **Certified** Instructor/Trainer, a **Certified** Internal Verifier/Assessor/Trainer by the **Institute of Leadership and Management (ILM)**, a fellow member of The Netherlands Royal Institute of Chartered Accountant (**CA**), **The Netherlands**, The Association of Certified Fraud Examiners (**CFE**), **USA**, The Institute of Public Accountants (**IPA**), **Australia** and The Institute of Financial Accountants (**IFA**), **UK** and has obtained the UNDP Security Clearance Trainings (**BSAFE**). Moreover, he has developed several **international public** courses on **auditing** and **accounting** and presented several papers on **IPSAS** and has further delivered various trainings, workshops, seminars, courses and conferences worldwide.

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.

Accommodation

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

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: Monday, 20th of October 2025

0800 - 0830	Registration & Coffee
0830 - 0845	Welcome & Introduction
0845 - 0900	PRE-TEST
0900 - 1030	Factors Influencing Investments by Firms Interest Rates • Economic Growth • Confidence • Inflation
1030 - 1045	Break
1045 - 1200	Factors Influencing Investments by Firms (cont'd) Productivity of Capital • Availability of Finance • Wage Costs • Depreciation
1200 - 1300	Lunch
1300 - 1400	Types of Financial Investments Shares • Bonds • Treasury Bills • Options
1400 - 1415	Break
1415 - 1450	Types of Financial Investments (cont'd) Annuities • Certificate of Deposit • Credit Default Swaps • Collateralized Debt Obligations
1450 - 1500	Recap
1500	End of Day One

Day 2: Tuesday, 21st of October 2025

0800 - 0930	Types of Financial Markets or Exchanges Stock Market • Bond Market • Forex Market • Derivatives Market
0930 - 0945	Break
0945 - 1200	Types of Financial Markets or Exchanges (cont'd) Money Market • Commodity Market • Spot Market • Real Estate Market

1200 - 1300	Lunch
1300 - 1400	Types of Investment Strategies Passive & Active Strategies • Growth Investing • Value Investing • Income Investing
1400 - 1415	Break
1415 - 1450	Types of Investment Strategies (cont'd) Dividend Growth Investing • Contrarian Investing • Indexing
1450 - 1500	Recap
1500	End of Day Two

Day 3: Wednesday, 22nd of October 2025

0800 - 0930	Methods of Property Investment Management Real Estate Investments for Rent
0930 - 0945	Break
0945 - 1200	Methods of Property Investment Management (cont'd) Investment Management by Real Estate Investment Groups
1200 - 1300	Lunch
1300 - 1400	Methods of Property Investment Management Real Estate Trading
1400 - 1415	Break
1415 - 1450	Methods of Property Investment Management (cont'd) Investment Management Through Real Estate Investment Trusts
1450 - 1500	Recap
1500	End of Day Three

Day 4: Thursday, 23rd of October 2025

0800 - 0930	Types of Companies & Stocks & Their Selection Process Growth Companies • Defensive Companies
0930 - 0945	Break
0945 - 1200	Types of Companies & Stocks & Their Selection Process Cyclical Companies • Speculative Companies
1200 - 1300	Lunch
1300 - 1400	Overview of Global Bond Markets Description • Types
1400 - 1415	Break
1415 - 1450	Overview of Global Bond Markets (cont'd) Participants • Distinction
1450 - 1500	Recap
1500	End of Day Four

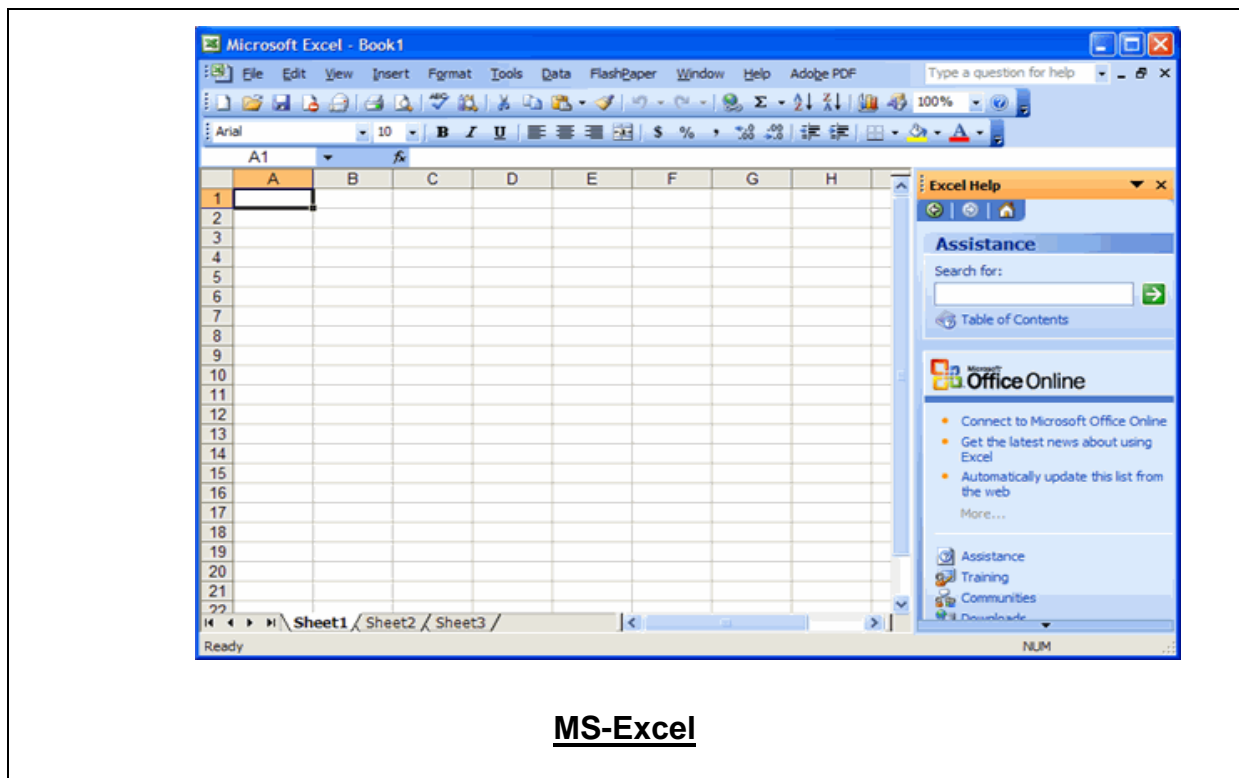
Day 5: Friday, 24th of October 2025

0800 - 0930	Factors Influencing Pension Plan Investments Knowledge of Plans & Schemes • Investment Tradition • Self-incentives (Defined Benefit versus Defined Contribution) • Legal & Regulatory Factors
0930 - 0945	Break
0945 - 1200	Factors Influencing Pension Plan Investments (cont'd) Global Financial Regulation • Risk Mitigation Tools • Income Growth • Unemployment Rate

1200 – 1300	Lunch
1300 – 1330	Steps in Investment Performance Measurement Benchmark Selection • Calculation of the Portfolio's Excess Return
1330 – 1345	Break
1345 - 1415	Steps in Investment Performance Measurement (cont'd) Performance Attribution • Risk Analysis
1415 - 1430	Course Conclusion
1430 – 1445	POST TEST
1445 – 1500	Presentation of Course Certificates
1500	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.



Course Coordinator

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