



COURSE OVERVIEW FM0063
Investment Analyst

Course Title

Investment Analyst

Course Date/Venue

November 10-14, 2025/Fujairah Meeting Room,
Grand Millennium Al Wahda Hotel, Abu Dhabi,
UAE

Course Reference

FM0063

Course Duration/Credits

Five days/2.75 CEUs/27.5 PDHs

Course Description

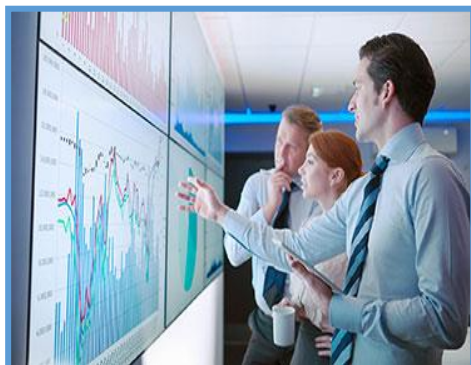


This highly-interactive course includes various practical sessions and exercises. Theory learnt will be applied using the “MS Excel” application.

This course is designed to provide participants with a detailed and up-to-date overview of Investment Analyst. It covers the importance of investments in agriculture and food sectors; the agricultural investment landscape and financial instruments in agricultural investments; the basics of data visualization and ethical considerations in agriculture investments; the key components of a financial model and valuation techniques in agriculture; the cost analysis, breakeven analysis and sensitivity analysis; the revenue streams and forecasting crop yield and market prices; and the risk management in agricultural investments, market research and competitive analysis.



During this interactive course, participants will learn the investment due diligence process and agricultural supply chain analysis; the role of technology in agriculture investments and investment strategies and agricultural portfolio management; the environmental, social and governance (ESG) and sustainable investment practices; the impact of climate change, global trade policies and tariffs; the geopolitical risks in agriculture markets, food security and global demand shocks on agriculture investments; the investment reporting, presentation skills and advanced financial modeling techniques; the agribusiness startups evaluation; and the agricultural and food regulations, international standards and subsidies and incentives for agricultural projects.



Course Objectives

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

- Get certified as a “*Certified Investment Analyst*”
- Discuss the importance of investments in agriculture and food sectors including agricultural investment landscape and financial instruments in agricultural investments
- Explain the basics of data visualization and ethical considerations in agriculture investments
- Identify the key components of a financial model and apply valuation techniques in agriculture
- Carryout cost analysis, breakeven analysis and sensitivity analysis
- Recognize revenue streams and forecast crop yield and market prices
- Apply risk management in agricultural investments, market research and competitive analysis
- Illustrate investment due diligence process and agricultural supply chain analysis
- Define the role of technology in agriculture investments and apply investment strategies and agricultural portfolio management
- Employ environmental, social and governance (ESG) and sustainable investment practices
- Identify the impact of climate change, global trade policies and tariffs, geopolitical risks in agriculture markets and food security and global demand shocks on agriculture investments
- Carryout investment reporting, presentation skills and advanced financial modeling techniques
- Evaluate agribusiness startups covering key metrics, agritech innovation and funding trends
- Discuss the agricultural and food regulations, international standards and subsidies and incentives for agricultural projects

Exclusive Smart Training Kit - H-STK®



Participants of this course will receive the exclusive “Howard 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 analyst for aspiring investment analysts, junior analysts/entry-level professionals, portfolio managers, corporate finance professionals, individuals switching careers to finance, investment advisors or financial planners, experienced professionals seeking certification or continued learning and other technical staff.


Course Certificate(s)

(1) Internationally recognized Competency Certificates and Plastic Wallet Cards will be issued to participants who completed a minimum of 80% of the total tuition hours and successfully passed the exam at the end of the course. Successful candidate will be certified as a “*Certified Investment Analyst*”. Certificates are valid for 5 years.

Recertification is FOC for a Lifetime.

Sample of Certificates


The following are samples of the certificates that will be awarded to course participants:-

Certified Investment Analyst


Certification Number: 74851
 Certification Date: 15-Nov-2023
 Expiration Date: 15-Nov-2028

This is to certify that **Waleed Al Habeeb** has successfully met the requirements to be certified as a **Investment Analyst** under the Investment Analyst Program, FM0063-IH.



Mr. Jaryl Castillo
Academic Director

Haward Technology is accredited by:




Investment Analyst

Certification Program

This program is designed to assist companies in identifying professionals who have satisfied the minimum competencies specified in FM0063-IH.

Haward Technology does not warrant or guarantee the performance of any professional certified under this program.

Haward Technology is accredited by:



74851



- (2) Official Transcript of Records will be provided to the successful delegates with the equivalent number of ANSI/IACET accredited Continuing Education Units (CEUs) earned during the course.

* Haward Technology * CEUs * Haward Technology * CEUs * Haward Technology * CEUs * Haward Technology *



Haward Technology Middle East

Continuing Professional Development (HTME-CPD)

CEUs

CEU Official Transcript of Records

TOR Issuance Date: 15-Nov-23
HTME No. 74851
Participant Name: Waleed Al Habeeb

Program Ref.	Program Title	Program Date	No. of Contact Hours	CEU's
FM0063-IH	Investment Analyst	November 11-15, 2023	27.5	2.75

Total No. of CEU's Earned as of TOR Issuance Date **2.75**

TRUE COPY


Jaryl Castillo
 Academic Director

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




P.O. Box 26070, Abu Dhabi, United Arab Emirates | Tel.: +971 2 3091 714 | E-mail: info@haward.org | Website: www.haward.org


* Haward Technology * CEUs * Haward Technology * CEUs * Haward Technology * CEUs * Haward Technology *

Certificate Accreditations

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**. 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 **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 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.

Accommodation

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

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. Mike Taylor, PhD (on-going), MScLI, MBA, MBL, BSc, HDE, is a **Senior Finance & Management Consultant** with over **25 years** of experience in **Power & Water Utilities, Other Energy Sectors** and **Financial** industries. His expertise lies extensively in the areas of **Finance Budgeting, Budgeting, Forecasting & Planning, Budgeting** and **Cost Control, Finance & Budgeting Process & Procedures, Effective Budgeting & Cost Control, Project Financial Data, Financial Indicators, Financial Leverage, Discounted Cash Flows, Economic Cost Analysis, Equity Profitability Analysis, Financial Modelling & Forecasting, Financial Analysis Techniques, Financial Data Analysis Concepts & Process, Credit Analysis,**

Financial & Accounting Management, Financial Planning Techniques, Vendor Invoice Processing & Management, Evaluating Cost & Revenue, Budgeting & Cost Control and **Marketing Management, Project Quality Management, Quality Control & Site Inspection, Project Quality Plan, Construction Quality Management, Material Management & Project Turnover, Project Risk Management, Risk Identification Tools & Techniques, Project Life Cycle, Project Stakeholder & Governance, Project Management Processes, Project Integration Management, Project Management Plan, Project Work Monitoring & Control, Project Scope Management, Project Time Management, Project Cost Management, Project Quality Management, Quality Assurance, Project Human Resource Management, Project Communications Management, Project Planning, Scheduling & Cost Control Professional, Project Scheduling & Cost Control, Facilitation & Leadership Skills, Coaching, Human Resource Development, Psychometric Testing, Career Development & Competence, Succession Planning, Self-Development & Empowerment, Personal Learning Needs Identification, Data Quality Control, Data Quality Assessment, Data Quality Planning, Data Quality Strategy Management, Customer Management.** Further, he is also well-versed in. **Leadership Skills, Presentation Skills, Negotiation Skills, Decision Making Skills, Communication Skills, Emotional Intelligence, Performance Management, Contract Management, Quality Management, Commercial Strategy, Project Management, Risk Management, Leadership & Business Management, Human Resource Management, Planning, Budgeting & Cost Control, Business Development, Innovation, Sales Strategy and Knowledge & Intangible Asset Assessment Design.** Mr. Taylor is the **Founder & CEO** of Mitakon Innovation Pty Ltd wherein he is responsible for the development of Executives & Senior Managers specializing in innovation, knowledge management and commercial negotiation as well as authored, implemented and executed a global 21st century facilitation and leadership methodology.

During his career life, Mr. Taylor has gained his practical and field experience through his various significant positions and dedication as the **Knowledge-Solutions Service Provider, Founder-Principal/CIO, Subject Matter Expert, Consulting Partner, Executive/Management Development Facilitator, Multinational/Corporate Senior Management Consultant, Senior Quality & Finance Management Consultant, Executive Management Development/Facilitator, Business Consultant/Facilitator, Business & Quality Consultant/Coach, Client Director, Administration Manager, Quality Manager, International Sales & Business Development Executive, Regional Sales Manager, National Key Accounts Manager, Commercial Sales & Marketing Consultant, Admin Assistant, Sales & Marketing Representative, Key Note Speaker, Lecturer and Instructor/Trainer** for various international companies such as the Highland Group (Business Consulting), **Anglo American, BHP Billiton, Rio Tinto, DI Management Solutions (BPO), Master Deal Making Institute (MDMI), RMG/Contact Media & Communications, Paul Dinsdale Properties (PDP), Giant Leap Architects, Wise Capital Investments (HOD), Evolution@ Advertising, Collaborative Xchange, Leatt Corporation, Dentsply SA, FMCG/Binzagr Company, Unilever, Kellogg's, BAT, Hershey's, CORO, Lilly Direct/Lennon Generics and Bausch & Lomb.**

Mr. Taylor has **Master's** degree in **Leadership & Innovation, Business Administration** and **Business Leadership** as well as a **Bachelor** degree in **Physical Education** and pursuing **PhD** in **Global Governance & Energy Policy.** Further, he is a **Certified Instructor/Trainer, Certified Internal Verifier/Trainer/Assessor** by the **Institute of Leadership & Management (ILM)** and a member of **Incremental Advantage, Da Vinci Institute, Black Management Forum, Institute of Directors (IOD), World Future Society (WFS), Social Science Research Network, University of Kwazulu Natal (Alumnus), Anthropology & Archaeology Research Network and National Research Foundation (NRF).** He has further delivered numerous trainings, courses, workshops, seminars and conferences globally.



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.

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, 10th of November 2025

0800 – 0830	Registration & Coffee
0830 – 0845	Welcome & Introduction
0845 – 0900	PRE-TEST
0900 - 1030	Understanding Investment Basics <i>Defining Investment Analysis • Importance of Investments in Agriculture & Food Sectors • Key Stakeholders in Agricultural Investments • Risk versus Return in Agricultural Projects</i>
1030 - 1045	Break
1045 – 1130	Overview of Agriculture & Food Industry <i>Current Trends in Agriculture & Food • Key Sectors: Farming, Food Processing, & Agritech • Global & Regional Market Dynamics • Importance of Food Security</i>
1130- 1200	Agricultural Investment Landscape <i>Public versus Private Investments in Agriculture • Government Initiatives & Subsidies • Role of International Organizations (e.g., FAO, IFAD) • Sustainable & Impact-Driven Investments</i>
1200 - 1300	Lunch
1300 – 1330	Financial Instruments in Agricultural Investments <i>Loans, Equity, & Venture Capital • Agricultural Bonds & Green Bonds • Crowdfunding & Alternative Financing Methods • Commodity Futures & Derivatives</i>
1330 - 1400	Data Analysis Tools for Investment Decisions <i>Introduction to Excel for Financial Modeling • Basics of Data Visualization (Charts & Graphs) • Using Market Intelligence Tools for Agriculture • Case Study: Analyzing Agricultural Production Data</i>
1400 - 1415	Break



1415 - 1450	Ethical Considerations in Agriculture Investments <i>Environmental & Social Impact • Ethical Sourcing & Supply Chain Transparency • Regulatory Compliance • Balancing Profit with Sustainability</i>
1450 - 1500	Recap <i>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</i>
1500	<i>End of Day One</i>

Day 2: Tuesday, 11th of November 2025

0800 - 0840	Basics of Financial Modeling <i>Key Components of a Financial Model • Input, Process, & Output Structure • Building Assumptions for Agricultural Projects • Spreadsheet Design & Best Practices</i>
0840 - 0930	Valuation Techniques in Agriculture <i>Net Present Value (NPV) & Internal Rate of Return (IRR) • Discounted Cash Flow (DCF) Analysis • Asset-Based Valuation for Agricultural Land & Equipment • Comparable Company Analysis (CCA)</i>
0930 - 0945	<i>Break</i>
0945 - 1100	Cost Analysis in Agricultural Projects <i>Fixed versus Variable Costs in Farming & Food Production • Breakeven Analysis for Agricultural Ventures • Sensitivity Analysis for Input Price Fluctuations • Case Study: Cost Structure of a Farming Business</i>
1100 - 1200	Revenue Projections <i>Identifying Revenue Streams in Agriculture • Forecasting Crop Yield & Market Prices • Seasonality & Its Impact on Revenue • Evaluating Government Support & Subsidies</i>
1200 - 1300	<i>Lunch</i>
1300 - 1415	Risk Management in Agricultural Investments <i>Identifying Risks: Market, Operational, Environmental • Strategies to Mitigate Investment Risks • Role of Insurance in Agriculture (Crop, Equipment, & Livestock) • Scenario Analysis for Risk Planning</i>
1400 - 1415	<i>Break</i>
1415 - 1450	Case Study Workshop <i>Building a Financial Model for a Hypothetical Agricultural Project • Group Presentations on Investment Recommendations • Peer Review & Feedback</i>
1450 - 1500	Recap <i>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</i>
1500	<i>End of Day Two</i>

Day 3: Wednesday, 12th of November 2025

0800 - 0840	Market Research Fundamentals <i>Understanding Market Demand & Supply Dynamics • Identifying Consumer Trends in Food & Agriculture • Tools for Conducting Market Research • Real-World Example: Analyzing a Crop Market</i>
-------------	--





0840 - 0930	Competitive Analysis Identifying Competitors in Agriculture & Food Sectors • Analyzing Market Positioning • SWOT Analysis for Agricultural Businesses • Case Study: Competitive Landscape of the Dairy Sector
0930 - 0945	Break
0945 - 1100	Investment Due Diligence Process Steps in Conducting Due Diligence • Evaluating Financial, Operational, & Environmental Aspects • Assessing the Legal & Regulatory Framework • Tools for Effective Due Diligence Reporting
1100 - 1200	Lunch
1200 - 1300	Agricultural Supply Chain Analysis Key Components of an Agricultural Supply Chain • Challenges in Supply Chain Management • Evaluating Supply Chain Efficiency • Role of Technology in Modernizing Supply Chains
1300 - 1415	Break
1400 - 1415	Role of Technology in Agriculture Investments Precision Farming & Agritech Solutions • Digital Tools for Market Analysis • Blockchain for Supply Chain Transparency • Case Study: Role of Drones in Agriculture
1415 - 1450	Workshop: Designing a Market Entry Strategy Developing a Strategy for Entering a New Agricultural Market • Identifying Key Risks & Opportunities • Group Activity: Presenting Strategies to a Panel
1450 - 1500	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
1500	End of Day Three

Day 4: Thursday, 13th of November 2025

0800 - 0840	Overview of Investment Strategies Growth versus Value Investing in Agriculture • Impact Investing: Environmental & Social Returns • Diversification in Agricultural Portfolios • Case Study: Successful Agricultural Investment Strategies
0840 - 0930	Agricultural Portfolio Management Creating an Optimal Portfolio for Agriculture • Diversifying Across Regions, Crops, & Technologies • Balancing Risk & Return in Portfolio Design • Monitoring & Rebalancing Agricultural Investments
0930 - 0945	Break
0945 - 1100	ESG & Sustainable Investment Practices Environmental, Social, & Governance (ESG) Factors • Assessing ESG Metrics for Agricultural Projects • Integrating Sustainability into Investment Decisions • Real-World Example: Green Farming Initiatives
1100 - 1200	Impact of Global Events on Agriculture Investments Climate Change & its Effects on Agriculture • Global Trade Policies & Tariffs • Geopolitical Risks in Agriculture Markets • Food Security & Global Demand Shocks
1200 - 1300	Lunch





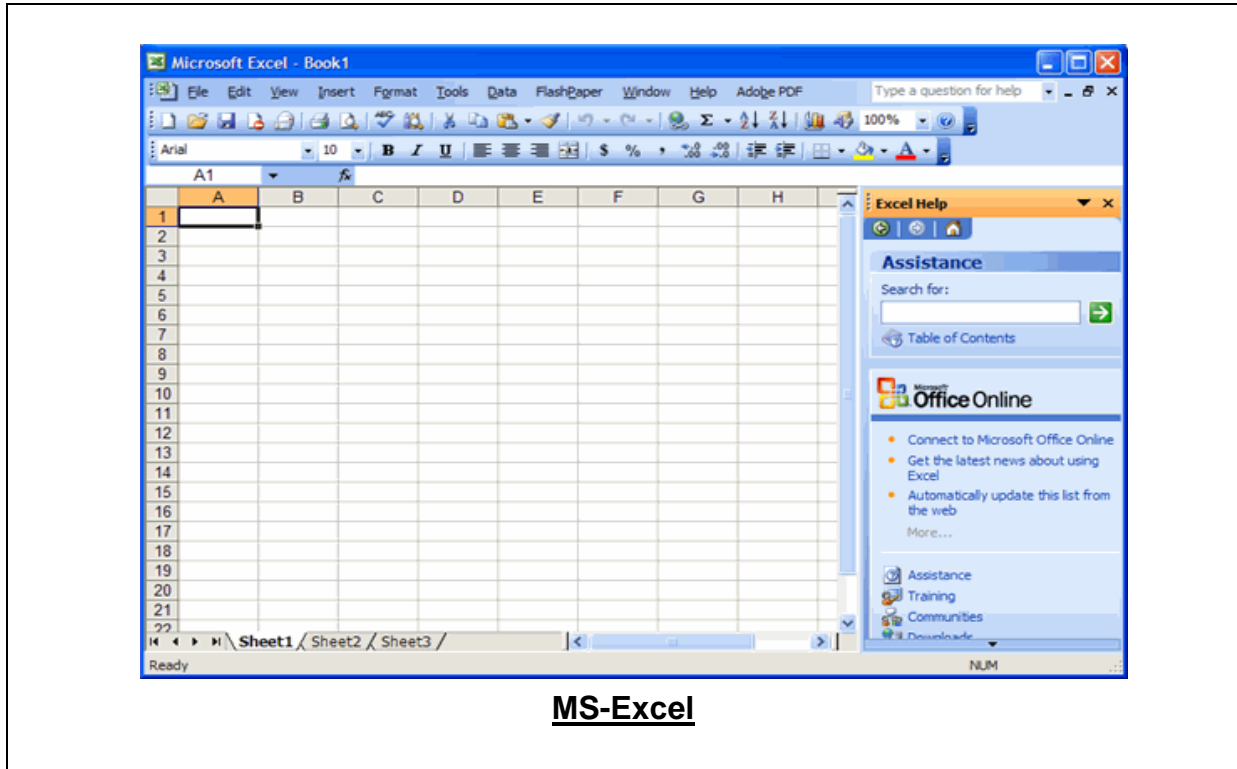
1300 - 1415	Investment Reporting & Presentation Skills Writing an Effective Investment Report • Data Visualization for Presenting Findings • Structuring Recommendations for Stakeholders • Workshop: Presenting an Investment Pitch
1400 - 1415	Break
1415 - 1450	Case Study: Evaluating an Agricultural Investment Portfolio Group Activity: Analyzing a Real-World Portfolio • Identifying Areas of Improvement & Diversification • Presenting Actionable Recommendations
1450 - 1500	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
1500	End of Day Four

Day 5: Friday, 14th of November 2025

0800 – 0840	Advanced Financial Modeling Techniques Scenario Analysis for Uncertain Agricultural Conditions • Building Dynamic Models for Farming Operations • Integrating Macroeconomic Variables into Models • Workshop: Advanced Excel Functions for Modeling
0840 – 0930	Evaluating Agribusiness Startups Key Metrics for Assessing Startups • Agritech Innovation & Funding Trends • Challenges in Scaling Agricultural Businesses • Case Study: Reviewing Agritech Startup
0930 – 0945	Break
0945 - 1130	Policy & Regulatory Considerations Agricultural & Food Regulations • International Standards & Certifications (e.g., GAP, HACCP) • Subsidies & Incentives for Agricultural Projects • Navigating Compliance Challenges
1130 - 1230	Lunch
1230 – 1245	Future of Agriculture Investments Trends in Vertical Farming & Urban Agriculture • Role of AI & IoT in Agriculture • Innovations in Food Production (e.g., Lab-Grown Meat) • Investing in Water-Efficient Farming Methods
1245 – 1300	Break
1300 - 1330	Capstone Project: Comprehensive Investment Proposal Group Activity: Developing a Full Investment Proposal • Including Financial Models, Market Research & ESG Considerations • Presenting the Proposal to a Panel of Experts • Peer & Instructor Feedback
1330 – 1345	Course Conclusion Using this Course Overview, the Instructor(s) will Brief Participants about the Course Topics that were Covered During the Course
1345 – 1445	COMPETENCY EXAM
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

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