BUSINESS & INVESTMENT ANALYSIS



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Introduction

Business & Investment Analysis Training Course builds the analytical capability that connects commercial understanding with investment decisions. Analysing a business means reading its markets, cost structure, competitive position, and cash generation. Analysing an investment means testing whether the price you pay leaves room for an adequate return. The two skills are related but not identical, and weak analysis in either produces capital committed on optimism. This course builds both. It covers business model analysis, financial diagnostics, and valuation. Furthermore, it applies ratio analysis, forecasting, DCF and multiples, and investment appraisal. In addition, it develops risk assessment and investment recommendation reporting. As a result, participants analyse businesses and investments with defensible evidence.

Business & Investment Analysis Course Objectives

- Explain how business analysis differs from and informs investment analysis.
- Analyse business models, value drivers, and competitive position.
- Apply financial statement analysis to assess business performance.
- Perform ratio, trend, common-size, and peer comparison analysis.
- Build driver-based forecasts of revenue, cost, and cash flow.
- Value businesses using DCF, multiples, and asset-based methods.
- Apply NPV, IRR, and payback criteria to investment decisions.
- Assess earnings quality and identify reporting distortions.
- Evaluate strategic, market, and execution risk in investments.
- Prepare investment analysis reports with defensible recommendations.

Course Methodology

- Interactive lectures with real business and investment cases.

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- Business model and financial diagnostic workshops.
- Valuation and investment appraisal modelling exercises.
- Risk assessment and sensitivity analysis practice.
- Structured peer review with facilitator feedback on investment recommendations.

Who Should Take This Course

- Investment analysts and equity research professionals.
- Corporate development and M&A professionals.
- Corporate finance and treasury analysts.
- Financial analysts and business partners.
- Private equity and venture capital analysts.
- Consultants preparing investment and business analysis reports.

Business & Investment Analysis Course Outlines

Day 1: Business Analysis Foundations

- Business analysis versus investment analysis and their relationship.
- Business model mapping and revenue architecture.
- Value driver identification and competitive positioning.
- Industry structure analysis and Porter's Five Forces.
- Markets, customers, and demand analysis.
- Management quality and governance assessment.
- Case study: analysing a business model and its strengths.

Day 2: Financial Diagnostics and Ratio Analysis

- Financial statement structure and interconnection.
- Profitability, efficiency, liquidity, and gearing ratios.
- Trend, common-size, and peer benchmarking analysis.
- Cash flow analysis and free cash flow computation.
- Earnings quality review and manipulation indicators.
- DuPont analysis and return decomposition.
- Workshop: building a financial diagnostic of a business.

Day 3: Forecasting and Business Valuation

- Driver-based revenue and cost forecasting.
- Building integrated forecast models across statements.
- Cost of capital estimation and discount rate selection.
- Discounted cash flow valuation and terminal value.
- Multiples valuation: EV/EBITDA, P/E, and price-to-book.
- Sum of the parts, asset-based, and replacement valuation.
- Workshop: valuing a business using DCF and multiples.

Day 4: Investment Appraisal and Risk

- Net present value, internal rate of return, and payback criteria.
- Profitability index and capital rationing decisions.
- Sensitivity, scenario, and Monte Carlo analysis.
- Strategic, market, execution, and integration risk assessment.
- Risk-adjusted returns and hurdle rate setting.
- Break-even and economic limit analysis.
- Workshop: appraising an investment proposal with risk testing.

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Day 5: Investment Reporting and Decision Delivery

- Structuring an investment analysis report.
- Building the investment thesis and supporting evidence.
- Presenting valuation ranges and key assumptions.
- Handling challenge from investment committees.
- Monitoring post-investment performance.
- Governance and approval processes for investments.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Business & Investment Analysis, participants will gain a thorough understanding of business analysis foundations, financial diagnostics and ratio analysis, forecasting and business valuation, investment appraisal and risk assessment, and investment reporting and decision delivery. They will also acquire practical skills in business model and competitive analysis, financial diagnostics and ratio analysis, business valuation and forecasting, and investment appraisal, risk assessment and investment reporting. In addition, the course prepares them to analyse businesses and investments with evidence that withstands challenge. Gentex Training Center delivers this programme with a strong focus on applied analytical technique and defensible investment conclusions.

FAQs for Business & Investment Analysis course

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Q1 What is the "Business & Investment Analysis" course about?

It is a five-day programme on analysing businesses and the investments made in them. It covers business models and competitive positioning, financial diagnostics and ratio analysis, driver-based forecasting, DCF and multiples valuation, NPV and IRR investment appraisal, risk assessment, and investment reporting.

Q2 What are the key benefits of the "Business & Investment Analysis" course?

Participants reach investment conclusions that hold up under committee challenge. The course improves business model and competitive assessment, sharpens financial diagnostics and earnings quality review, strengthens forecast and valuation modelling, improves risk-adjusted appraisal, and raises the quality of investment reporting and recommendation writing.

Q3 What skills will I gain from the "Business & Investment Analysis" course?

Participants gain business model and competitive analysis, financial diagnostics and ratio analysis, business valuation and forecasting, and investment appraisal, risk assessment and investment reporting. These four skills cover the practical core of business and investment analysis.

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Q4 What tools, methods, or standards are covered in the "Business & Investment Analysis" course?

The course covers business model mapping and revenue architecture, value driver identification, Porter's Five Forces industry analysis, customer and demand analysis, management and governance assessment, financial statement structure and interconnection, profitability, efficiency, liquidity and gearing ratios, trend and common-size analysis, peer benchmarking, free cash flow computation, earnings quality review and manipulation indicators, DuPont analysis and return decomposition, driver-based revenue and cost forecasting, integrated forecast model construction, cost of capital and discount rate estimation, discounted cash flow valuation, terminal value estimation, EV/EBITDA, P/E and price-to-book multiples, sum of the parts and asset-based valuation, net present value, internal rate of return, payback and profitability index, capital rationing decisions, sensitivity, scenario and Monte Carlo analysis, strategic, market, execution and integration risk assessment, risk-adjusted return analysis, hurdle rate setting, break-even and economic limit analysis, investment thesis construction, valuation range presentation, investment committee challenge handling, and post-investment performance monitoring.

Q5 How is the "Business & Investment Analysis" course applied in real-world practice?

Participants apply the methods to real businesses and investment opportunities. They map business models, run financial diagnostics, review earnings quality, build driver-based forecasts, value businesses with DCF and multiples, appraise investments with NPV and IRR, run sensitivity and scenario analysis, assess strategic and execution risk, and prepare investment analysis reports with clear recommendations and caveats. Many leave with a business diagnostic template, a valuation model, and an investment report structure ready to use.