



AI-Powered Financial Analysis Course

17 – 21 May 2027
Madrid (Spain)



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Introduction

The AI-Powered Financial Analysis course equips professionals to understand how artificial intelligence can strengthen financial analysis and decision-making. It examines AI applications across financial data, statements, forecasting, risk assessment, valuation, and performance analysis. Participants explore how machine learning, predictive analytics, automation, and intelligent pattern recognition can improve the speed and depth of financial insights. The program connects traditional financial analysis with modern AI-driven methods while emphasizing analytical judgment, data quality, transparency, and responsible interpretation. Practical cases illustrate how organizations can use AI to identify trends, assess financial health, improve forecasts, and support strategic decisions. Participants can evaluate AI-enabled financial analysis techniques and apply them to complex business scenarios.

Targeted Groups

This AI-Powered Financial Analysis training targets professionals seeking knowledge and skills:

- Finance managers improving AI-driven financial decision-making.
- Financial analysts strengthening data interpretation and forecasting.
- FP&A professionals enhancing predictive financial planning.
- Management accountants applying AI to performance analysis.
- Investment professionals evaluating trends, risks, and valuations.
- Auditors examining financial data with intelligent analytical techniques.
- Controllers improving reporting, variance analysis, and financial controls.
- Business leaders using financial insights for strategic decisions.

Course Objectives

Participants will achieve the following objectives by completing the AI-Powered Financial Analysis course:

- Explain AI concepts relevant to modern financial analysis and decision-making.
- Identify suitable AI techniques for financial data analysis and reporting.
- Interpret financial statements using AI-supported analytical methods and financial ratios.
- Evaluate data quality, completeness, consistency, and relevance before analysis.
- Apply predictive analytics to revenue, expenses, cash flow, and financial performance.
- Assess financial trends through automated pattern recognition and anomaly detection.
- Compare forecasting approaches using historical financial data and business assumptions.
- Evaluate investment opportunities using AI-supported valuation and scenario analysis.
- Analyze liquidity, profitability, solvency, efficiency, and growth indicators.
- Recognize financial risks through intelligent monitoring and predictive risk analysis.
- Critically assess model outputs and distinguish useful insights from misleading correlations.
- Integrate AI-generated insights into financial planning and management reporting.
- Evaluate ethical, governance, transparency, privacy, and bias considerations in AI use.
- Communicate AI-supported financial findings clearly to management and decision-makers.

Targeted Competencies

Participants will gain the following competencies during the AI-Powered Financial Analysis program:

- Interpret financial data using AI.
- Evaluate financial statements and ratios.
- Apply predictive analytics to financial trends.
- Identify anomalies and unusual patterns.
- Build evidence-based financial forecasts.
- Assess financial risks and scenarios.
- Question AI outputs using professional judgment.
- Communicate AI-supported financial insights.

Real-world Case Studies

In this AI-Powered Financial Analysis training, participants develop skills through the following cases:

- Analyze financial statements, detect cost anomalies, and identify margin drivers.
- Forecast sales, cash flow, and working-capital needs under changing demand.
- Compare financial ratios, valuation assumptions, and risk indicators for investment decisions.

Course Content

Unit 1: Foundations of AI-Powered Financial Analysis

- Define AI and its role in financial decision-making.
- Explain machine learning, predictive analytics, NLP, and automation.
- Distinguish traditional and AI-enabled financial analysis.
- Identify datasets for analysis, forecasting, and reporting.
- Assess financial data quality and relevance.
- Examine structured and unstructured financial information.
- Recognize the importance of human judgment and skepticism.

Unit 2: AI-Enhanced Financial Statement Analysis

- Interpret income statements, balance sheets, and cash flows.
- Apply AI to assess financial performance and trends.
- Calculate and interpret key financial ratios.
- Detect unusual movements through automated analysis.
- Identify relationships among major financial statement elements.
- Use pattern recognition to identify performance drivers.
- Compare results with historical, budget, and industry data.

Unit 3: Predictive Financial Analytics and Forecasting

- Explain predictive analytics for financial forecasting and planning.
- Prepare revenue forecasts using financial and business data.
- Forecast expenses, cash flows, margins, and working capital.
- Compare predictive models for accuracy and relevance.
- Analyze scenarios involving demand, costs, and economic conditions.
- Detect financial anomalies through intelligent monitoring.
- Evaluate forecast uncertainty and model limitations.

Unit 4: AI for Valuation, Investment, and Financial Risk

- Apply AI to investment analysis and corporate valuation.
- Analyze DCF assumptions, growth, discount rates, and terminal values.
- Evaluate ratios for comparison and investment screening.
- Assess liquidity, credit, market, and operational risks.
- Identify emerging financial vulnerabilities using predictive analysis.
- Test investment and financing decisions through scenario analysis.
- Interpret AI recommendations using financial judgment and evidence.

Unit 5: AI-Driven Financial Planning, Reporting, and Decision-Making

- Integrate AI insights into planning and management reporting.
- Support FP&A with predictive analysis and scenario planning.
- Automate analytical tasks while maintaining review controls.
- Design dashboards for trends, risks, forecasts, and KPIs.
- Evaluate transparency, bias, privacy, security, and governance.
- Establish controls for data and model validation.
- Communicate AI-supported findings to key stakeholders.
- Combine AI evidence, financial analysis, and strategic judgment.

Final Insights & Key Takeaways

The course combines AI, financial analytics, forecasting, valuation, and risk assessment for better decision-making. It emphasizes data quality, critical judgment, governance, and actionable financial insights.