MERCURY

Advanced Financial Analysis Operations

19 – 23 April 2027
Johannesburg (South Africa)



Dubai - UAE: +971 4 450 5697
Istanbul - Türkiye: +90 539 599 1206
Amman - Jordan: +962 79 712 3347

Advanced Financial Analysis Operations

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Introduction

The Advanced Financial Analysis Operations course aims to give participants an advanced understanding of financial statement analysis tools and techniques. It focuses on developing the ability to assess financial performance using financial data, analyze advanced financial trends, and prepare advanced reports. Participants learn how to detect financial fraud, identify weaknesses, and conduct advanced financial statement analysis for organizations.

This Advanced Financial Analysis Operations program strengthens the ability to conduct advanced financial analysis that supports advanced financial forecasting, helping participants make accurate strategic decisions. It enables trainees to analyze profitability using advanced techniques and evaluate financial performance through advanced methods, alongside applications of advanced financial analysis in companies.

This Advanced Financial Analysis training course provides updated content aligned with market changes and financial reporting standards, giving financial analysts a powerful tool to understand and improve financial performance. Participants will use tools such as Excel, charts, and forecasting indicators to refine their analytical skills. This course is for analysts and finance managers seeking to develop advanced financial analysis skills.

Targeted Groups

The Advanced Financial Analysis Operations course targets professionals and individuals seeking to acquire knowledge and skills:

- Chief accountants in financial institutions and companies.
- Finance managers and accounting department managers.
- Experienced accountants seeking career advancement.
- Financial analysts working in financial institutions.
- Financial controllers and internal audit managers.
- Credit risk analysts and banking professionals.
- Investor relations officers and financiers.
- Professionals specializing in advanced financial forecasting and financial trend analysis.
- Finance managers in multinational corporations.
- Anyone seeking to acquire advanced financial analysis skills for finance managers.

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Training Course Objectives

By the end of this Advanced Financial Analysis Operations course, participants will be able to:

- Analyze financial statements and prepare advanced reports accurately and professionally.
- Distinguish between basic and advanced elements of financial statements.
- Interpret financial data and identify its relationship to companies' financial performance.
- Apply advanced financial analysis tools such as trend analysis and ratio analysis.
- Use analytical software such as Excel to present data and reports effectively.
- Evaluate organizations' advanced cash flows using analytical tools.
- Identify financial manipulation techniques and assess the quality of reported earnings.
- Develop advanced financial forecasting models using historical data.
- Build accurate market analyses using advanced market ratio analysis.
- Support decision-making by evaluating financial performance through advanced methods.
- Strengthen critical thinking and professional skepticism when reviewing financial statements.
- Design profitability analysis tools using advanced techniques.
- Link financial analysis to organizational objectives and improve strategic decisions.
- Develop high-quality analytical outputs that support financial planning processes.

Targeted Competencies

Participants will acquire the following competencies through the Advanced Financial Analysis Operations program:

- Understanding advanced financial analysis concepts and applications.
- Ability to interpret and analyze advanced financial statements.
- Acquiring skills in using advanced financial analysis techniques.
- Evaluating financial performance using quantitative tools.
- Applying analytical skills to detect financial fraud.
- Ability to conduct financial forecasting using financial analysis.
- Using Excel tools to analyze ratios and market trends.
- Evaluating the quality of financial reports and providing professional financial critique.
- Preparing analytical reports that support decision-making.
- Using advanced methods for profitability and liquidity analysis.

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Course Content

Unit 1: Introduction to Advanced Financial Analysis

- Defining advanced financial analysis operations and their objectives.
- Identifying users of financial data and analyzing their needs.
- Understanding the importance of advanced financial statement analysis for investors and managers.
- Comparing regional and international financial standards.
- Explaining the main financial statement elements: balance sheet, income statement, and cash flow statement.
- Understanding the components of other comprehensive income and their impact on financial analysis.
- Understanding the importance of non-financial elements such as governance and sustainability reports.
- Applying advanced financial analysis for finance managers in dynamic environments.
- Identifying cognitive biases that affect financial analysis and decision-making.
- Understanding the importance of analytical reading of annual financial reports.
- Understanding the relationship between financial performance and cash flow analysis.
- Examining the role of advanced financial analysis in supporting long-term financial forecasting.

Unit 2: Ratio and Sector Analysis Using Excel

- Applying the top-down analysis methodology and its impact on the quality of results.
- Using macroeconomic indicators in advanced financial analysis.
- Analyzing sectors using Porter's Five Forces model.
- Calculating indicators for GDP, unemployment, inflation, and interest rates.
- Using Excel for advanced financial trend analysis.
- Analyzing profitability and evaluating operational performance.
- Calculating and accurately analyzing liquidity and solvency ratios.
- Evaluating efficiency and working capital management.
- Applying the Altman Z-Score model to identify bankruptcy probabilities.
- Designing advanced financial analysis reports using charts.
- Analyzing common-size financial statements to enhance strategic insight.
- Case studies from major companies Apple, Starbucks for practical application.

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Unit 3: Evaluating Reporting Quality and Detecting Financial Manipulation

- Developing an integrated framework for evaluating financial reporting quality.
- Using tools to assess the quality of reported earnings and cash flows.
- Applying the Beneish M-Score model to detect earnings manipulation.
- Identifying indicators of poor balance sheet quality.
- Critically analyzing the accounting standards used.
- Understanding the role of financial auditing in assessing the reliability of financial information.
- Studying cases to identify inconsistencies in financial reports.
- Using risk indicators for early detection of manipulation.
- Evaluating financial sustainability through analysis of accumulated performance.
- Analyzing the implicit implications of notes in annual reports.
- Building internal assessment tools to detect fraud.
- Reading annual reports through an advanced analytical perspective.

Unit 4: Financial Forecasting Techniques Using Advanced Analysis

- Understanding the difference between top-down and bottom-up forecasting.
- Building financial models to forecast revenues and costs.
- Analyzing and accurately forecasting costs of sales.
- Using financial period averages to estimate the budget.
- Estimating fixed assets and accurately calculating depreciation.
- Preparing a three-year financial forecast using historical data.
- Designing financial schedules that support investment decisions.
- Integrating economic data into advanced financial forecasting models.
- Forecasting cash flows using advanced financial analysis techniques.
- Real-world case study: Johnson & Johnson forecasting.
- Conducting sensitivity analysis and identifying the impact of changes in assumptions.
- Developing multiple scenarios for advanced financial forecasting.

Unit 5: Detecting Financial Fraud and False Reporting

- Understanding advanced financial analysis concepts in combating fraud.
- Examining methods used to detect false reporting and manipulation.
- Using advanced cash flow indicators to detect fraud.
- Analyzing real cases of financial manipulation and documenting findings.
- Building an internal control system based on financial analysis indicators.
- Applying fraud analytics tools in financial institutions.
- Evaluating fraud indicators in balance sheets and interim reports.
- Comparing traditional and advanced financial analysis in fraud detection.
- Building a financial risk matrix using trend analysis tools.
- Reading cases and analyzing their results to understand fraudulent methods.
- Practical training on Excel models for fraud detection.
- Providing improvement recommendations to reduce the risks of reporting manipulation.

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Final Insights & Key Takeaways

The course significantly advances participants' understanding and application of advanced financial analysis concepts. Participants acquire modern analytical tools that enable them to evaluate financial performance and forecast accurately. The techniques used help detect fraud and improve the quality of strategic decisions. The course enables trainees to conduct advanced financial analysis using the latest tools. We recommend applying the knowledge gained to real-world data and continuing to develop analytical skills regularly.