MERCURY

Chartered Financial Analyst

15 – 19 November 2027
Barcelona (Spain)



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

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Ref: 16402_1084012 **Date:** 15 – 19 November 2027 **Location:** Barcelona (Spain) **Fees:** 5600 Euro

Introduction:

The Chartered Financial Analyst course develops advanced competency in investment analysis, ethics, and portfolio management. This course covers the three-level CFA curriculum structure and the practical skills required to analyze securities, value assets, and construct robust portfolios. It emphasizes ethical and professional standards as the foundation of all investment decision-making.

Participants will follow a structured path that mirrors the CFA Program's progressive learning outcomes and exam focus. The Chartered Financial Analyst program balances conceptual mastery with applied problem-solving and case-based analysis. Completion prepares learners to pursue CFA exams, qualify for charterholder status, and apply industry-standard techniques in real-world finance roles.

Targeted Groups:

This Chartered Financial Analyst training targets professionals seeking specialized knowledge and skills:

- Early-career analysts aiming to enter investment management.
- Portfolio managers seeking advanced valuation techniques.
- Risk analysts working with fixed income and derivatives.
- Wealth advisors preparing for fiduciary responsibilities.
- Finance graduates planning CFA exam preparation.
- Corporate finance professionals expanding into asset valuation.
- Compliance officers strengthening ethics knowledge.

Course Objectives:

Participants will achieve the following objectives by completing the Chartered Financial Analyst course:

- Demonstrate foundational knowledge of investment tools and financial concepts.
- Apply quantitative methods to analyze asset returns and risk.
- Evaluate company financial statements for valuation and credit assessment.
- Construct and justify diversified portfolios using modern portfolio theory.
- Analyze fixed income instruments and derivative contracts for hedging strategies.
- Integrate ethical standards into professional investment decisions.
- Interpret macroeconomic indicators and their impacts on markets.
- Prepare strategically for each CFA exam level through practice and review.

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Targeted Competencies:

Participants will gain the following competencies during the Chartered Financial Analyst program:

- Mastery of core valuation techniques for equities and bonds.
- Accurate application of statistical tools to investment problems.
- Competence in constructing risk-adjusted performance metrics.
- Ability to design portfolio allocations aligned with client objectives.
- Skill in interpreting derivatives and alternative investment uses.
- Strong ethical reasoning applied to real-world investment dilemmas.
- Fluency with CFA-style question formats and time-efficient exam tactics.

Studying Scenarios:

In this Chartered Financial Analyst training, participants will develop their skills through the analysis of the following scenarios:

- Valuing a public company using DCF under rising inflation.
- Stress-testing a fixed-income portfolio during interest-rate shifts.
- Designing a client's allocation with constraints and liability profiles.
- Structuring a hedge using options for currency exposure.
- Resolving an ethical conflict between client interest and firm policy.

Course Content:

Unit 1: Foundations & Ethical Standards:

- Overview of the CFA Program and exam structure.
- Professional and ethical responsibilities.
- Code of ethics applied in case exercises.
- Quantitative fundamentals and time value of money.
- Statistical measures of returns and dispersion.
- Introduction to financial reporting and analysis.
- Study strategy and exam problem formats.

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Unit 2: Financial Reporting & Analysis; Corporate Finance:

- Framework for analyzing financial statements.
- Income statement, balance sheet, cash flow insights.
- Ratio analysis and forensic indicators.
- Revenue recognition and inventory methods.
- Cost of capital and capital budgeting.
- Corporate governance and stakeholder implications.
- Application exercises on earnings quality.

Unit 3: Equity & Fixed Income Investments:

- Equity market structures and valuation models.
- Dividend discount and relative valuation methods.
- Fixed income terminology and yield measures.
- Term structure and interest-rate risk analysis.
- Credit analysis and default risk assessment.
- Bond valuation under different yield curves.
- Case problems on selecting securities for portfolios.

Unit 4: Derivatives, Alternative Investments & Portfolio Management:

- Derivative instruments: forwards, futures, swaps, options.
- Pricing basics for options and payoff diagrams.
- Strategies for hedging and speculative positions.
- Characteristics of alternative assets and real assets.
- Portfolio theory and diversification benefits.
- Asset allocation and portfolio construction frameworks.
- Risk management tools and scenario analysis.

Unit 5: Applied Valuation, Macroeconomics & Exam Readiness:

- Integrated valuation across asset classes.
- Macro drivers and their investment implications.
- Currency and international finance considerations.
- Practical problem sets in CFA exam format.
- Time management and exam-day tactics.
- Mock exams and structured feedback sessions.
- Roadmap to charterholder application and work-experience alignment.

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Final Insights & Key Takeaways:

Completion builds technical mastery in valuation, ethics, and portfolio management aligned to professional practice. The course positions participants to pursue CFA exams and apply industry-standard methods confidently.