



Investment Analysis & Portfolio Management: Advanced Level

Finance & Accounting

QGT-FIN-135 | Advanced | 5 or 10 days | Online, classroom, in-house

Course overview

Investment Analysis & Portfolio Management: Advanced Level is an advanced programme for experienced practitioners in Investment Analysis & Portfolio Management. It covers the principles, the requirements of IFRS, IIA standards, COSO and GCC tax regulations, and the practical methods used on site, with case studies from operations in the Gulf, Africa and worldwide. Available online, in the classroom in 60 cities, or in-house.

What participants will be able to do

- Explain the principles, terminology and scope of Investment Analysis & Portfolio Management
- Apply the relevant requirements of IFRS, IIA standards, COSO and GCC tax regulations
- Apply advanced analysis methods to real operating data
- Recognise common problems, risks and root causes and choose the right corrective action
- Prepare an improvement plan for their own site or organisation

Who should attend

Designed for finance professionals, accountants, auditors and budget holders with at least three years of experience.

Course outline (5 days)

Day 1: Core principles revisited

Fast review and recent changes in IFRS, IIA standards, COSO and GCC tax regulations

Day 2: Advanced analysis methods

Detailed techniques, data interpretation and calculations

Day 3: Design and performance optimisation

Improving reliability, efficiency and cost

Day 4: Troubleshooting complex cases

Diagnosing multi-cause problems from field data

Day 5: Risk, decisions and integration

Building a risk-based plan and presenting recommendations

What the 10-day edition adds

Day 6: Applied project, part 1 – Apply the week-one methods to a case from your organisation

Day 7: Data and digital tools – Software, spreadsheets and digital tools used in practice

Day 8: Lessons from incidents and audits – What investigations and audit findings teach

Day 9: Applied project, part 2 – Complete, test and refine your solution

Day 10: Presentations and final assessment – Present to the group and complete the final assessment

Fees (USD per participant)

Duration	Live online	Classroom	In-house
5 days	\$3,000	\$5,500	On quote
10 days	\$5,500	\$9,900	On quote

Fees include course material and certificate of completion; classroom fees include refreshments and lunch. In-house training is priced per group.

Dates and cities 2027–2030

Dates	City	Format	Duration	Fee
8–19 Mar 2027	Kigali	Classroom	10 days	\$9,900
29 Mar – 2 Apr 2027	Paris	Classroom	5 days	\$5,500
5–16 Apr 2027	Rome	Classroom	10 days	\$9,900
14–18 Jun 2027	Milan	Classroom	5 days	\$5,500
9–20 Aug 2027	Online (live)	Online (live)	10 days	\$5,500
30 Jan – 10 Feb 2028	Salalah	Classroom	10 days	\$9,900
28 Feb – 3 Mar 2028	Casablanca	Classroom	5 days	\$5,500
9–20 Apr 2028	Manama	Classroom	10 days	\$9,900
6–10 Nov 2028	Brussels	Classroom	5 days	\$5,500
13–24 Nov 2028	Online (live)	Online (live)	10 days	\$5,500
12–23 Feb 2029	Cape Town	Classroom	10 days	\$9,900
18–22 Jun 2029	Marrakech	Classroom	5 days	\$5,500
22 Oct – 2 Nov 2029	Amsterdam	Classroom	10 days	\$9,900
12–16 Nov 2029	Kigali	Classroom	5 days	\$5,500
3–14 Dec 2029	Online (live)	Online (live)	10 days	\$5,500
6–17 Jan 2030	Al Khobar	Classroom	10 days	\$9,900
18–22 Feb 2030	Dublin	Classroom	5 days	\$5,500
26 May – 6 Jun 2030	Doha	Classroom	10 days	\$9,900
1–5 Jul 2030	Vienna	Classroom	5 days	\$5,500
7–18 Oct 2030	Online (live)	Online (live)	10 days	\$5,500

How to register

Register online or scan the code

<https://qimmatrainig.com/courses/investment-analysis-and-portfolio-management-advanced-level/>

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