



Investment Analysis & Portfolio Management

Finance & Accounting

QGT-FIN-114 | Foundation | 5 or 10 days | Online, classroom, in-house

Course overview

Investment Analysis & Portfolio Management is an introduction that builds a solid working knowledge 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
- Use practical tools, checklists and calculations with confidence
- 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, new joiners and anyone who needs a solid grounding in the subject.

Course outline (5 days)

Day 1: Principles and terminology

Scope, key definitions and how Investment Analysis & Portfolio Management fits into daily operations

Day 2: Codes, standards and requirements

What IFRS, IIA standards, COSO and GCC tax regulations require, and how to read them

Day 3: Methods, tools and calculations

Step-by-step methods, checklists and worked examples

Day 4: Operation, inspection and common problems

Typical failures, warning signs and what to do about them

Day 5: Case studies, workshop and assessment

Group exercise on real cases and a final knowledge check

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
18–22 Apr 2027	Doha	Classroom	5 days	\$5,500
17–28 May 2027	Barcelona	Classroom	10 days	\$9,900
2–6 Aug 2027	Lagos	Classroom	5 days	\$5,500
9–20 Aug 2027	London	Classroom	10 days	\$9,900
22–26 Nov 2027	Online (live)	Online (live)	5 days	\$3,000
14–18 May 2028	Manama	Classroom	5 days	\$5,500
30 Jul – 10 Aug 2028	Al Khobar	Classroom	10 days	\$9,900
7–11 Aug 2028	Abu Dhabi	Classroom	5 days	\$5,500
2–13 Oct 2028	Baku	Classroom	10 days	\$9,900
27 Nov – 1 Dec 2028	Online (live)	Online (live)	5 days	\$3,000
5–9 Mar 2029	Singapore	Classroom	5 days	\$5,500
23 Apr – 4 May 2029	Istanbul	Classroom	10 days	\$9,900
20–24 May 2029	Muscat	Classroom	5 days	\$5,500
10–21 Jun 2029	Dammam	Classroom	10 days	\$9,900
29 Oct – 2 Nov 2029	Online (live)	Online (live)	5 days	\$3,000
7–11 Jan 2030	Munich	Classroom	5 days	\$5,500
24 Mar – 4 Apr 2030	Cairo	Classroom	10 days	\$9,900
12–16 May 2030	Kuwait City	Classroom	5 days	\$5,500
10–21 Jun 2030	Nairobi	Classroom	10 days	\$9,900
18–22 Nov 2030	Online (live)	Online (live)	5 days	\$3,000

How to register

Register online or scan the code

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

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