



Investment Analysis & Portfolio Management: Practical Workshop

Finance & Accounting

QGT-FIN-156 | Practical workshop | 5 or 10 days | Online, classroom, in-house

Course overview

Investment Analysis & Portfolio Management: Practical Workshop is a hands-on workshop built around exercises and real site problems 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 who want practice rather than theory.

Course outline (5 days)

Day 1: Workshop briefing and baseline

Participants bring a real problem from their own site

Day 2: Guided practice 1

Hands-on exercises using templates, checklists and calculators

Day 3: Guided practice 2

Simulations and role-play based on Investment Analysis & Portfolio Management scenarios

Day 4: Field cases from the Gulf and Africa

Analysing what went wrong and what worked

Day 5: Action plan and peer review

Each participant leaves with a reviewed improvement plan

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 Jan 2027	Manchester	Classroom	5 days	\$5,500
22 Mar – 2 Apr 2027	Dubai	Classroom	10 days	\$9,900
17–21 May 2027	Johannesburg	Classroom	5 days	\$5,500
8–19 Nov 2027	Istanbul	Classroom	10 days	\$9,900
22–26 Nov 2027	Online (live)	Online (live)	5 days	\$3,000
3–7 Jul 2028	Berlin	Classroom	5 days	\$5,500
9–20 Jul 2028	Manama	Classroom	10 days	\$9,900
17–21 Jul 2028	Brussels	Classroom	5 days	\$5,500
13–24 Aug 2028	Cairo	Classroom	10 days	\$9,900
18–22 Sep 2028	Online (live)	Online (live)	5 days	\$3,000
8–12 Jan 2029	Luanda	Classroom	5 days	\$5,500
14–25 Jan 2029	Manama	Classroom	10 days	\$9,900
20–24 May 2029	Alexandria	Classroom	5 days	\$5,500
12–23 Aug 2029	Kuwait City	Classroom	10 days	\$9,900
10–14 Sep 2029	Online (live)	Online (live)	5 days	\$3,000
20–24 Jan 2030	Salalah	Classroom	5 days	\$5,500
4–15 Feb 2030	Barcelona	Classroom	10 days	\$9,900
20–24 May 2030	Tunis	Classroom	5 days	\$5,500
8–19 Jul 2030	Milan	Classroom	10 days	\$9,900
12–16 Aug 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-practical-workshop/>

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