



FINANCE AND TREASURY TRAINING

Portfolio Investment Analysis

5 day course

Classroom, online or in-house

Course overview

A technical course on analysing investments for inclusion in a portfolio. Delegates work through equity valuation using discounted cash flow and relative methods, fixed income pricing and yield analysis, credit assessment, and the analysis of an investment's contribution to portfolio risk rather than its risk in isolation. Substantial attention goes to interrogating the assumptions in a valuation, since most valuation disputes are assumption disputes, and to the specific difficulty of valuing assets in markets with limited comparable transactions.

What you will learn

- Value equities using discounted cash flow and relative methods
- Price fixed income instruments and analyse yield
- Assess credit quality and its effect on required return
- Analyse an investment's contribution to portfolio risk
- Interrogate the assumptions underlying a valuation
- Value assets where comparable transactions are limited
- Present an investment recommendation with its assumptions stated

Who should attend

- Investment analysts
- Portfolio managers and asset managers
- Corporate finance professionals
- Pension fund and institutional investment staff
- Finance professionals moving into investment roles

Course outline

- 01 Discounted cash flow valuation of equities
- 02 Relative valuation and comparable selection
- 03 Fixed income pricing and yield analysis
- 04 Credit assessment and required return
- 05 Contribution to portfolio risk against standalone risk
- 06 Interrogating valuation assumptions
- 07 Valuation with limited comparable transactions
- 08 Presenting a recommendation

Upcoming dates

Dates	Venue	Format	Fee per delegate
17 to 21 September 2026	Windhoek, Namibia	Classroom	R11,995
20 to 24 September 2026	Dar es Salaam, Tanzania	Classroom	R11,995
20 to 24 September 2026	Cape Town, South Africa	Classroom	R11,995
29 September to 3 October 2026	Nairobi, Kenya	Classroom	R11,995

Fees and how to register

Online **from R6,500** per delegate, classroom **from R11,995** per delegate, in-house training is quotation on request. Book 2 or more delegates on this course and save 10%.



To register or request an in-house proposal, visit www.afrisciencegroup.com, email info@afriScience.co.za, or WhatsApp us on **+27 63 479 1136**.

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