



3-Course Series

- Financial Modeling & Valuation
- Data Analytics using R
- Business Intelligence using Power BI and Tableau

Online Self-Paced Course

FINANCIAL MODELING & VALUATION *THEMED TRACK*



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1-Year of Access

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Financial Modeling & Valuation

Module 1: Excel Refresher

1. Freezing, sorting and conditional formatting
2. Creating Hyperlinks through Excel function
3. COUNT related functions
4. Lookup based functions (VLOOKUP, HLOOKUP)
5. Lookup based functions (INDEX and MATCH)
6. SUMPRODUCT function and related cases
7. Text related functions
8. Date related functions
9. Conditional summation (SUMIFS)
10. Combining text from a range of cells (TEXTJOIN)
11. Getting value from a database using DGET function
12. Data summarization using Pivot Table and Slicer
13. AGGREGATE function
14. Financial functions and creating loan amortization

Module 2: Corporate Finance and Investment Banking

1. Corporate finance essentials (Capital budgeting, Time value of money, project evaluation methods)
2. NPV Crossover
3. Evaluation in case of unequal lives
4. Project evaluation cases
5. Investment Banking Overview

Module 3: Financial Modeling Overview

1. What is financial Modeling?
2. Developing an initial financial model using Telecom case study
3. Capex schedule
4. Drafting P&L
5. Valuation - Applying DCF

Module 4: Building Integrated Financial Model

1. Working on Historical Statements
2. Modeling Assumptions for Future Action
3. Revenue Build-up – projecting the future revenues
4. Cost Build-up – projecting the future cost
5. Asset and Depreciation Schedules
6. Debt and Equity Schedules
7. Modeling the Financial Statements (P&L, BS and CFS)
8. Interest income and breaking circularity
9. Valuation related workings
10. Cost of equity (CAPM) and post-tax cost of debt
11. Computing WACC
12. Absolute valuation: Performing valuation using DCF (FCFF and Enterprise Value)
13. Relative valuation: Comparable analysis
14. Performing sensitivity analysis

Module 5: M&A Analysis

1. M&A evaluation case study
2. Searching and researching relevant reports
3. Collecting and projecting numbers
4. Merger analysis – key drivers and inputs
5. Projecting both companies' numbers
6. Synergy benefits
7. Stock payment and stake dilution
8. Modeling a financing plan
9. Pre-merger profitability and EPS
10. Accretion/dilution analysis

Module 6: Data Visualization

1. Data visualization using charts
2. Presenting historical & projected data together
3. Creating profit & loss Bridge
4. Depicting variance analysis
5. Dynamic chart for dashboards using form control option buttons and combo box
6. Flexible chart using Scroll bar form control and Excel's OFFSET function

Module 7: Project Finance Model

1. Project finance case study
2. Setting up required inputs and assumptions related to the project
3. Incorporating contingency element as part of project cost
4. Modeling Operating revenue
5. Operating Cost drivers and computation
6. Fixed asset schedule
7. Project Financing - creating a debt schedule
8. Modeling Equity related schedules - Paid up capital and reserves & surplus
9. Preparing financial statements - PL, BS and CF
10. Project evaluation (Project IRR)
11. Sensitivity analysis - evaluating the impact of changes in key project variables on project profitability

Data Analytics using R

Module 1: Introduction and Programming

1. Introduction to Data Analytics
2. Introduction to R
 - a. R programming
 - b. R programming - Case Study
 - c. Customer Churn

Module 2: Statistics and Visualization

1. Data Visualization: Various graphs, charts
2. Data Visualization: Advance
3. Descriptive Statistics: Basic statistical techniques including data properties: Hypothesis testing DPLYR package.
4. Linear Regression Model
5. Multinomial Linear Regression - Case Study
6. Logistic Regression
7. Multinomial Logistic Regression
 - a. Multinomial Logistic Regression - Case Study

Module 3: Advance Methods

1. Introduction to Artificial intelligence, ML and Deep learning
2. Neural Networks
3. Support Vector Machines (SVM)
4. Support Vector Machines (SVM) - Case Study
5. Decision Tree
6. Random Forest
7. K-nearest Neighbors
8. K-nearest Neighbors - Case Study
9. Clustering (K Means)
10. Principle Component Analysis
11. Principle Component Analysis - Case Study

Business Intelligence (Power BI & Tableau)

Module 1: Introduction

Module 2: Power BI

Module 3: Tableau

Module 4: Software Support

- a. Support Material
- b. Final Assessment
- c. Power BI and Tableau Instructions
- d. Software Download Instructions



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Contact Details



Counsellor : +91 7758832162
: +91 9137662466



gen_pdp@nse.co.in

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