Datastat Research
Building Capacity in Training and Research

DATASTAT TRAINING IN

OFFICIAL COURSE PROSPECTUS

Center for Advanced Research & Professional Development

Nairobi Training Center • Global Virtual Academy • Corporate On-Site

ACCOUNTING AND FINANCE

Equity Research and Securities Valuation Training Course

Comprehensive Course Syllabus, Practical Modules & Upcoming Schedules

PROGRAM SPECIFICATIONS & HIGHLIGHTS

DURATION
10 Days Practical Hands-on

DELIVERY MODES
In-Person Class & Live Virtual

CERTIFICATION
Accredited Certificate of Completion

INTAKES / DATES
Multiple Cohort Schedules Included

PREPARED FOR:

Valued Participant

Email: training@datastatresearch.org | Issued: November 24, 2026

Academic & Professional Training Year: 2026

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Equity Research and Securities Valuation Training Course

Accounting and Finance • 10 Days Intensive • Accredited Certification

Course Overview

Equity Research and Securities Valuation Training Course provides comprehensive knowledge and practical skills in financial analysis, investment research, equity valuation, and securities market assessment.

Key Skills & Software Tools Covered

MS Word • Microsoft Excel • Bloomberg Terminal • and Refinitiv Eikon (LSEG Workspace)

Upcoming Training Schedules

Confirmed cohort intakes and venues. Both physical in-person classroom and live virtual online seats are available.

TRAINING DATES	LOCATION / VENUE	FORMAT / DURATION	INVESTMENT (FEE)
7 Dec 2026 – 18 Dec 2026	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
21 Dec 2026 – 1 Jan 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
4 Jan 2027 – 15 Jan 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
18 Jan 2027 – 29 Jan 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
1 Feb 2027 – 12 Feb 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
15 Feb 2027 – 26 Feb 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
1 Mar 2027 – 12 Mar 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
15 Mar 2027 – 26 Mar 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
29 Mar 2027 – 9 Apr 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
12 Apr 2027 – 23 Apr 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
26 Apr 2027 – 7 May 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
10 May 2027 – 21 May 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
24 May 2027 – 4 Jun 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
7 Jun 2027 – 18 Jun 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
21 Jun 2027 – 2 Jul 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
5 Jul 2027 – 16 Jul 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
19 Jul 2027 – 30 Jul 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
2 Aug 2027 – 13 Aug 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
16 Aug 2027 – 27 Aug 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
30 Aug 2027 – 10 Sep 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
13 Sep 2027 – 24 Sep 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
27 Sep 2027 – 8 Oct 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
11 Oct 2027 – 22 Oct 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**

25 Oct 2027 – 5 Nov 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
8 Nov 2027 – 19 Nov 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
22 Nov 2027 – 3 Dec 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**
6 Dec 2027 – 17 Dec 2027	Nairobi	Classroom / 10d	**$3,000 USD / KES 220,000**

* Corporate discounts and customized cohort scheduling are available for teams of 3 or more participants.

Course Curriculum & Modules

Equity Research and Securities Valuation Training Course

Introduction

Equity Research and Securities Valuation Training Course provides comprehensive knowledge and practical skills in financial analysis, investment research, equity valuation, and securities market assessment. The course explores advanced valuation methodologies, including discounted cash flow analysis, dividend discount models, comparable company analysis, precedent transactions, and asset-based valuation. Participants will develop expertise in analysing financial statements, evaluating corporate performance, interpreting market trends, assessing investment risks, and determining the intrinsic value of publicly traded securities. Emphasis is placed on financial modelling, capital markets intelligence, investment forecasting, and data-driven decision-making to support effective portfolio management and strategic investment decisions.

The programme also examines emerging developments in global financial markets, including artificial intelligence in investment research, environmental, social and governance considerations, quantitative investment analysis, and regulatory compliance. Through practical exercises and international case studies, participants will learn how to prepare professional equity research reports, develop investment recommendations, assess securities mispricing, and identify attractive investment opportunities. The training equips investment professionals, financial analysts, fund managers, and corporate finance practitioners with globally relevant competencies to improve investment performance, strengthen risk management, and support sustainable wealth creation.

Course Objectives

By the end of this course, participants will be able to:

- Apply advanced equity research methodologies and investment analysis techniques.
- Conduct comprehensive financial statement and ratio analysis.
- Perform discounted cash flow and intrinsic value calculations.
- Apply comparable company and precedent transaction valuation models.
- Evaluate stocks using dividend discount and earnings-based models.
- Develop advanced financial models and investment forecasts.
- Analyse macroeconomic indicators and capital market trends.
- Identify undervalued and overvalued securities using quantitative analysis.
- Evaluate corporate governance and environmental, social and governance risks.
- Apply artificial intelligence and financial technology in equity research.
- Assess investment risks and securities market volatility.
- Prepare professional equity research reports and investment recommendations.
- Strengthen portfolio allocation and investment decision-making strategies.

Organizational Benefits

- Improved investment research accuracy and analytical capabilities.
- Enhanced securities valuation and investment decision-making.
- Stronger financial forecasting and performance evaluation.
- Better identification of profitable investment opportunities.
- Improved portfolio diversification and risk management.
- Enhanced competitiveness in global capital markets.
- More effective capital allocation and investment planning.
- Stronger corporate financial intelligence and market positioning.
- Improved compliance with financial reporting and securities regulations.
- Increased institutional investment performance and shareholder value.

Target Audiences

- Equity research analysts and investment analysts.
- Portfolio managers and fund managers.
- Investment bankers and financial advisers.
- Securities brokers and stock market professionals.
- Corporate finance and treasury professionals.
- Financial controllers and investment accountants.
- Asset management and wealth management professionals.
- Economists, financial consultants, and institutional investors.

Course Duration: 10 days

Course Modules

Module 1: Foundations of Equity Research and Securities Markets

- Principles and scope of equity research.
- Structure and functioning of global securities markets.
- Equity instruments, stock exchanges, and market participants.
- Primary and secondary market analysis.
- Investment research ethics and professional standards.
- Case study: New York Stock Exchange and London Stock Exchange market structures.

Module 2: Financial Statement Analysis for Equity Research

- Analysis of income statements and balance sheets.
- Cash flow statement interpretation.
- Financial ratios and profitability indicators.
- Earnings quality and accounting adjustments.
- Assessing corporate financial sustainability.
- Case study: Apple Inc. financial performance analysis.

Module 3: Macroeconomic and Industry Analysis

- Economic indicators and equity market performance.
- Interest rates, inflation, and exchange rate impacts.
- Industry lifecycle and competitive positioning.
- Sector analysis and market forecasting.
- Political, economic, and regulatory risk assessment.
- Case study: German automotive industry and changing global economic conditions.

Module 4: Equity Valuation Fundamentals

- Principles of intrinsic and relative valuation.
- Market value versus book value.
- Enterprise value and equity value calculations.
- Valuation assumptions and financial drivers.
- Understanding valuation multiples.
- Case study: Microsoft Corporation equity valuation.

Module 5: Discounted Cash Flow Valuation

- Free cash flow to firm and equity calculations.
- Forecasting future cash flows.
- Weighted average cost of capital estimation.
- Terminal value and perpetual growth models.
- Sensitivity and scenario analysis.
- Case study: Amazon discounted cash flow valuation.

Module 6: Comparable Company Analysis

- Identifying suitable peer companies.
- Price-to-earnings and price-to-book ratios.
- Enterprise value to earnings before interest, taxes, depreciation and amortisation.
- Benchmarking financial performance.
- Relative valuation adjustments.
- Case study: Comparing Coca-Cola and PepsiCo valuations.

Module 7: Dividend Discount and Earnings-Based Valuation

- Dividend discount model applications.
- Gordon growth valuation methodology.
- Earnings per share and price-to-earnings analysis.
- Dividend sustainability and payout ratios.
- Forecasting earnings and dividend growth.
- Case study: Johnson & Johnson dividend valuation.

Module 8: Financial Modelling and Investment Forecasting

- Building integrated financial models.
- Revenue and expense forecasting.
- Modelling balance sheets and cash flows.
- Scenario planning and sensitivity testing.
- Spreadsheet-based investment analysis.
- Case study: Tesla financial forecasting and valuation modelling.

Module 9: Precedent Transactions and Mergers Valuation

- Understanding transaction-based valuation.
- Selecting relevant acquisition comparables.
- Calculating transaction multiples.
- Evaluating acquisition premiums.
- Merger synergies and valuation adjustments.
- Case study: Microsoft acquisition of LinkedIn.

Module 10: Quantitative Equity Research and Data Analytics

- Quantitative investment research techniques.
- Statistical analysis and regression modelling.
- Factor investing and market anomalies.
- Financial data interpretation and visualisation.
- Artificial intelligence applications in securities research.
- Case study: Renaissance Technologies quantitative investment approach.

Module 11: Securities Risk Assessment and Portfolio Analysis

- Market, credit, and liquidity risk assessment.
- Beta, volatility, and correlation analysis.
- Portfolio diversification strategies.
- Value at Risk and stress testing.
- Risk-adjusted investment performance.
- Case study: Global financial market volatility during the 2008 financial crisis.

Module 12: Environmental, Social and Governance Integration

- Environmental, social and governance investment principles.
- Sustainability indicators and corporate disclosures.
- Climate risk and financial materiality.
- Governance assessment and shareholder rights.
- Sustainable investment valuation considerations.

- Case study: Ørsted's renewable energy transformation.

Module 13: Equity Research Reporting and Investment Recommendations

- Structuring professional equity research reports.
- Developing buy, hold, and sell recommendations.
- Investment thesis development.
- Price targets and valuation justification.
- Communicating investment risks and opportunities.
- Case study: Goldman Sachs equity research reporting practices.

Module 14: Securities Regulation, Ethics and Compliance

- Global securities regulatory frameworks.
- Insider trading and market manipulation.
- Financial disclosure and transparency requirements.
- Conflicts of interest in investment research.
- Professional ethics and compliance controls.
- Case study: United States Securities and Exchange Commission enforcement actions.

Module 15: Advanced Investment Strategies and Emerging Trends

- Growth, value, and momentum investing strategies.
- Algorithmic and artificial intelligence-driven research.
- Private equity and public securities valuation.
- Global investment opportunities and emerging markets.
- Integrating research findings into portfolio strategies.
- Case study: Singapore sovereign wealth investment strategies and global portfolio diversification.

Training Methodology

- Interactive presentations and expert-led discussions.
- Practical equity valuation and financial modelling exercises.
- Group assignments and investment research simulations.
- International securities market case study analysis.
- Spreadsheet-based financial forecasting workshops.
- Real-world investment report preparation and presentations.
- Peer learning, knowledge sharing, and practical assessments.

Register as a group from 3 participants for a Discount

Send us an email: info@datastatresearch.org or call +254724527104

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to DATASTAT CONSULTANCY LTD account, as indicated in the invoice so as to enable us prepare better for you.

Certification & Learning Methodology

- Hands-on practical delivery with real-world datasets, case studies, and lab exercises.
- Post-training mentorship, access to class resources, and customized follow-up support.
- Participants who successfully complete the course receive an accredited Datastat Certificate of Completion.

How to Enroll & Reserve Your Seat

1. Online Registration: Visit https://datastatresearch.org/courses/equity-research-and-securities-valuation-training-course to register online.
2. Email Booking: Send participant details to training@datastatresearch.org for official invoice & reservation.
3. Support & Assistance: Inquire via phone +254 724 527 104 | +254 734 969 612.