
Detailed Training Syllabus (7 Days)

Program Title: Financial Modeling & Power BI for Financial Analysts

Duration: 7 Days | 8 Hours per Day | Instructor-Led | Fully Hands-On

Learning Objectives

By the end of the program, participants will be able to:

- ✓ Build professional-grade, fully linked financial models
- ✓ Perform business valuation using DCF & market multiples
- ✓ Automate model components for faster decision-making
- ✓ Use Power BI to create executive dashboards & financial insights
- ✓ Conduct model audits, stress tests, and scenario analyses

Day-by-Day Syllabus

Day 1 — Financial Modeling Foundations & Best Practices

Module 1: Introduction to Financial Modeling

- Purpose & types of financial models
- Structuring models for clarity and transparency
- Building assumptions that drive projections
- Best practices: linking outputs → inputs correctly

Module 2: Excel for Analysts — Efficiency & Accuracy

- Analyst productivity shortcuts
- Data validation, scenario switches & version control
- Lookup mastery: XLOOKUP, INDEX-MATCH
- Error-proofing techniques (IFERROR, OFFSET, AGGREGATE)

Hands-On Implementation

- Build Assumption + Drivers sheet
- Create business logic-driven scenarios

Day 2 — Advanced Financial Modeling with Excel

Module 3: Forecasting Techniques

- Revenue, COGS & OPEX forecasting frameworks
- Seasonality & growth assumptions
- Working capital modeling for cashflow accuracy

Module 4: Statistical & Simulation Tools

- Variance and sensitivity modeling
- Goal Seek and Scenario Manager automation
- Monte Carlo simulations (risk-driven projections)
- Introduction to Option Pricing (Black-Scholes concept)

Hands-On Implementation

- Forecasting module + sensitivity automation
- Monte Carlo simulation for valuation ranges

Day 3 — Financial Modeling Mastery (Valuation Focus)

Module 5: Business Valuation Techniques

- Equity vs enterprise valuation logic
- WACC & Beta calculation
- Terminal value (Gordon Growth & Exit Multiple)
- Comparable multiples analysis

Module 6: 3-Statement Model Integration

- Fully linked P&L, Balance Sheet, Cash Flow model
- Debt & interest schedule
- Circularity, error tracking, iterative formulas

Hands-On Implementation

- Build an integrated 3-statement model
- Valuation dashboards inside Excel

Day 4 — Programming for Financial Modeling (Automation Focus)

Module 7: Financial Automation in Excel

- Dynamic forecasting functions
- Introduction to Macros (VBA optional)
- Button-driven reporting automation

Module 8: Custom Logic & Audit Techniques

- Model stress testing & error management

- Financial model documentation & governance

Hands-On Implementation

- Create automated valuation output generator
- Build audit checklist & validation rules

Day 5 — Power BI for Financial Analysts (Data Fundamentals)

Module 9: Power BI Setup & Data Modeling

- Connecting Excel models to Power BI
- ETL using Power Query – Data cleansing & transformation
- Star schema modeling for finance

Module 10: DAX Fundamentals for Finance

- Calculated Columns vs Measures
- Financial KPIs (Margins, ROI, EPS, Net Profit %, ROA)

Hands-On Implementation

- Connect financial model → Power BI
- Create KPI Scorecard using DAX

Day 6 — Power BI for Financial Reporting & Visualization

Module 11: Advanced DAX & Time Intelligence

- YoY, QoQ metrics & variance analysis
- Rolling forecasts & trend analysis

Module 12: Financial Dashboard Engineering

- Cashflow & profitability visuals
- Scenario-based reporting for CXO decision-making
- Publishing dashboards with Row-Level Security (RLS)

Hands-On Implementation

- Create CFO Financial Dashboard
- Build Board-ready insight reports

Day 7 — Real-World Case Studies + Model Audit Workshop

Module 13: Industry Case Studies

- **IPO Model:** Valuation & investor return metrics
- **M&A Model:** Accretion/dilution, synergies & deal analysis

Module 14: Advanced Model Audit & Optimization

- Error detection tools
- Performance optimization
- Documentation standards for handover

Capstone Project – Final Submission(Optional)