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## 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

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### 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
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### Day-by-Day Syllabus

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#### 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
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#### 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
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### **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
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### **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
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### **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
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### **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
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### **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)*