



*Training Course:
The Bank Analyst*

*17 - 21 May 2027
Lisbon (Portugal)*

Training Course: The Bank Analyst

Training Course code: FI234765 From: 17 - 21 May 2027 Venue: Lisbon (Portugal) - Training Course Fees: 6050 € Euro

Introduction

This Bank Analyst training program will take place in an interactive learning environment where you will learn the most important skills and tools to become a bank analyst, you will learn the Financial Systems

From Securities Markets and Financial Intermediation into the spread of businesses and control cycle with managing market and credit risk. This program will shed the light on bank valuations and acquisitions and banking crises.

Course objectives

Participants of this training course will learn:

- The principal means whereby capital from investors is channeled to borrowers
- The foundations for the approaches and methods used to value financial assets.
- The functions of central banks and the tools they have to influence the supply and price of money
- Examine deposit taking and retail and corporate lending.
- Focus on interest rate, foreign exchange and credit risk management.
- Explore the fundamental basis for value-at-risk VaR methods for controlling market risk
- How this can be used in the context of credit risk assessment?
- The different types of fund managers and investment products offered
- Examine the methods used to assess portfolio performance.
- The subject of equity valuations is both broad and complex.
- Examine the major causes of banking crises and the methods most commonly used in their resolution.
- How the financial services industry is policed by regulators and supervisors and the functions of accounting authorities and audit bodies?
- The most important balance sheet items and income statement lines and their related ratios.
- how to go about forecasting the balance sheet and income statement looking at loan growth forecasts and net interest income in particular detail?

Target Audience

- Finance professionals
- Analysts and portfolio managers.
- Consultants, accountants, auditors and legal practitioners.
- Financial journalists
- Corporate management
- Business school students and other graduates

Course outlines

Day 1

Financial Systems

- Securities Markets and Financial Intermediation
- Introduction to Securities Valuations
- Central Banks and the Creation of Money

Day 2

The Spread Business

- Deposit Taking and Other Funding
- Corporate Lending
- Operational Services
- Mortgage Lending
- Credit Cards and Other Retail Loans

Day 3

Risk Management

- The Controls Cycle
- Managing Interest Rate and FX Risk

- Trading
- Managing Market Risk
- Managing Credit Risk
- Capital Management

Day 4

Capital Markets

- Fund Management
- Stock and Bond Issuance and Brokerage
- Securitization

Bank Valuations and Acquisitions

- Bank Valuations
- Bank Acquisitions

Day 5

Problem Loans and Banking Crises

- Corporate Failures and Problem Loans
- Banking Crises
- Dealing with and Valuing Insolvent Banks

Supervision and Financial Statements

- Regulation, Supervision and Policing
- The Balance Sheet
- The Income Statement

Registration form on the Training Course: The Bank Analyst

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Complete & Mail or fax to Global Horizon Training Center (GHTC) at the address given below

Delegate Information

Full Name (Mr / Ms / Dr / Eng):
Position:
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Personal E-Mail:
Official E-Mail:

Company Information

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Full Name (Mr / Ms / Dr / Eng):
Position:
Telephone / Mobile:
Personal E-Mail:
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Payment Method

- ☐ Please find enclosed a cheque made payable to Global Horizon
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