



Consulting and Training | Reach New Heights

Course Name

Understanding Investors and Analysts

Sector Name

Finance, Accounting and Banking

Document Type

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Understanding Investors and Analysts

Course Introduction

Investors and financial analysts play a critical role in shaping market perception, valuation, and investment decisions. While many organizations focus on communication and engagement activities, fewer truly understand how investors and analysts think, analyze information, and form judgments.

Developed by **Boost**, this course focuses on building a deep understanding of investor and analyst perspectives, their objectives, analytical approaches, information needs, and decision drivers. Rather than teaching engagement tactics, the program equips participants to interpret market signals, anticipate questions, and align internal messaging with external financial expectations.

Boost's Understanding Investors and Analysts - Intermediate course helps professionals bridge the gap between internal performance and external market interpretation.

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Understanding Investors and Analysts

Target Audience

- ✓ Investor relations and corporate communications professionals
- ✓ Finance and strategy teams
- ✓ Business development and planning professionals
- ✓ Senior managers interacting with investors or analysts
- ✓ Professionals supporting executive and board-level reporting

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Learning Objectives

- ✓ Understand the roles of investors and financial analysts
- ✓ Identify different investor and analyst types and motivations
- ✓ Interpret how analysts evaluate financial and non-financial information
- ✓ Understand key drivers of valuation and market perception
- ✓ Anticipate investor and analyst expectations and concerns
- ✓ Improve internal readiness for investor and analyst scrutiny

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Understanding Investors and Analysts

Course Outline

✓ DAY 01

Who Are Investors and Analysts?

Module 1: The Investment Ecosystem

- ✓ Role of investors and analysts in financial markets
- ✓ Buy-side vs. sell-side perspectives
- ✓ How investors and analysts influence market perception

Module 2: Investor and Analyst Objectives

- ✓ What investors seek (returns, risk, sustainability)
- ✓ Analyst objectives and incentives
- ✓ Differences between short-term and long-term perspectives

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Course Outline

✓ Day 02

How Investors and Analysts Analyze Companies

Module 3: Analyst Thinking and Research Approaches

- ✓ Fundamental vs. thematic analysis
- ✓ Use of financial statements and disclosures
- ✓ Interpreting performance trends

Module 4: Information Sources and Signals

- ✓ Financial reports and management disclosures
- ✓ Market data and peer comparisons
- ✓ Qualitative signals and narrative assessment

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Course Outline

✓ Day 03

Valuation Drivers and Market Perception

Module 5: Key Drivers of Valuation

- ✓ Earnings quality and sustainability
- ✓ Growth prospects and risk perception
- ✓ Capital structure and cash flow signals

Module 6: How Analysts Form Views and Recommendations

- ✓ Rating frameworks (buy/hold/sell logic)
- ✓ Expectations vs. actual performance
- ✓ Common reasons for positive or negative coverage

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Course Outline

✓ Day 04

Expectations, Questions, and Scrutiny

Module 7: What Investors and Analysts Expect from Companies

- ✓ Transparency and consistency
- ✓ Credibility of management
- ✓ Strategic clarity and execution evidence

Module 8: Understanding Analyst and Investor Questions

- ✓ Why are certain questions asked
- ✓ Reading between the lines
- ✓ Anticipating concerns before they arise

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Course Outline

✓ Day 05

Internal Alignment and Market Readiness

Module 9: Aligning Internal Information with External Perspectives

- ✓ Translating internal performance into market language
- ✓ Aligning finance, strategy, and communications
- ✓ Avoiding mixed or unclear signals

Module 10: Using Investor and Analyst Insights Internally

- ✓ Learning from analyst reports
- ✓ Using feedback to improve strategy and disclosure
- ✓ Strengthening long-term market credibility

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
March 15, 2027	March 19, 2027	5 days	5950.00 \$	Switzerland , Zurich
April 26, 2027	April 30, 2027	5 days	4250.00 \$	UAE , Abu Dhabi
July 26, 2027	July 30, 2027	5 days	4250.00 \$	UAE , Abu Dhabi
Dec. 7, 2026	Dec. 11, 2026	5 days	4250.00 \$	UAE , Dubai

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