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EDUCBA

Equity Research Course

Email Contact: info@educba.com

www.educba.com

Course Overview

In this Course you get to learn:

Equity Research including Fundamental analysis, Financial Modeling, and Valuation of a Live company

Becoming an equity research analyst isn't an easy job. From analysis to looking for the right investments for the clients plus creating reports that support your findings is far from what we call easy.

However, becoming an equity research analyst can be learned. And you can learn it by doing this comprehensive course.

Equity Research Course Skills

We learn the following skills:

MS Excel: Even if as a ER analyst, it's given that you should know MS Excel, we haven't left anything to chance.

Valuation: You will learn the dividend discount model (DDM), discounted cash flow (DCF), and also how to calculate enterprise value (EV) and relative valuation.

Research report writing: Learn how you should approach ER report writing

Course Features

Course Duration- 40+ Hours

11 Number of Courses

Verifiable Certificates

Lifetime Access

Technical Excellence

About Equity Research Course

Equity research analysis is a complex undertaking. It involves financial analysis, financial modeling, looking at the fundamentals of the company, financial statement analysis, scenario analysis and a lot more.

When we talk about equity research, it can be from both buy side and sell side of a firm.

Equity research analysts look at the market, gauge the trends, analyze the factors, and also understand the impacts

Equity Research Course

This is a Bundle Course that includes complete in-depth Equity Research Training combined into one Complete Course.

This Bundle perfectly meets the requisite of the industry and gives you a better chance of being hired as a Equity Research professional.

1 Basic Microsoft Excel Training

Section 1. Getting Started

- Getting Started Ribbons Quick Access Toolbar
- Getting Started Surfing Excel HELP Function

Section 2. Case Study

- XYZ Company Basic Excel Case Study
- Excel Case Study

Section 3. Data Entry

- Data Entry in Excel

Section 4. Populating the Case Study in Excel

- Populating the Case Study in Excel
- Populating case study in excel without solution
- Populating case study in excel with solution

Section 5. Calculations

- Calculations Addition Subtract Multiply Division
- Calculations without solution
- Calculations with solution

Section 5. Formulas

- Formulas SUM MAX MIN AVERAGE
- Formulas without solution
- Formulas with solution

Section 6. Formatting

- Formatting Number Formats
- Formatting Number Formats without solution
- Formatting Number Formats with solution
- Formatting Table Formats
- Formatting Table Formats without solution
- Formatting Table Formats with solution

1 Basic Microsoft Excel Training

Section 7 . Updating a Calculation

- Updating a Calculation
- Updating a calculation without solution
- Updating a calculation with solution

Section 8 . Percentages Absolute References

- Percentages and Absolute References
- Percentage absolute refernces without solution
- Percentage absolute refernces with solution

Section 9. Conditional Formatting

- Conditional Formatting
- Conditional formatting without solution
- Conditional formatting with solution

Section 10. IF Function

- IF Function
- If function without solution
- If function with solution

Section 11. COUNTIF and SUMIF

- COUNTIF Function
- Count if without solution
- Count if with solution
- SUMIF Function
- Sum if with and without solution

Section 12. Charts and Graphs

- Creating Charts and Graphs
- Creating Charts and Graphs without solution
- Creating Charts and Graphs with solution
- Create Pie Charts
- Create Pie Charts without solution
- Create Pie Charts with solution

1 Basic Microsoft Excel Training

Section 13. Sorts and Filters

- Sorts
- Sorts without solution
- Sorts with solution
- Filter
- Filter without solution
- Filter with solution

Section 14 .Pivot Tables

- Percentages and Absolute References
- Percentage absolute refernces without solution
- Percentage absolute refernces with solution

Section 15. Freeze and Split

- Freeze and Split
- Freeze and split without solution
- Freeze and split with solution

Section 16. Presentation

- Presentation Table Formats
- Presentation Table Formats without solution
- Presentation Table Formats with solution
- Presentation Indents and Formatting Charts
- Presentation Indents and Formatting Charts

Section 17. Print

- Printing the Worksheet
- Printing Headers and Titles

Section 18. Shortcuts

- Shortcuts Formatting and Navigation
- Shortcuts Selection Data and Formula
- Basic Excel Shortcuts

Section 19. Common Errors

- Common Errors

2 Microsoft Excel - Advanced

Section 1. Key Difference MS Excel 2007 vs 2010

- Office Button and Paste Function
- Sparklines Custom Ribbons and Screenshots
- Conditional Formatting and Equation Editor

Section 2. Usefull Excel Function

- Paste Special
- Paste Special Base File
- Logical functions IF AND OR
- Logical Function Quiz Without Solution
- Logical Function Quiz With Solution
- Arithmetic functions MAX MIN ABS etc
- Quiz Arithmetic Function Without Solution
- Quiz Arithmetic Function With Solution
- COUNT COUNTIF COUNTA COUNTBLANK
- Cell Information ISERROR ISBLANK etc
- Cell Information Without Solution
- Cell Information With Solutio

Section 3 . Data Functions

- CHOOSE Function
- Choose Function Without Solution
- Choose Function With Solution
- VLOOKUP Function
- Vlookup Referencing Database File
- Vlookup Function Without Solution
- Vlookup Function With Solution
- HLOOKUP Function
- Hlookup Referencing Database File
- Hlookup Function Without Solution
- Hlookup Function With Solution
- MATCH INDEX
- Database functions DSUM DAVERAGE DCOUNT and others

2 Microsoft Excel - Advanced

Section 4. What If Analysis

- One Dimensional Data Tables

- Two dimensional Data Tables

- Solver

- Goal Seek and others

Section 5. Arrays

- Array Function Introduction

- Array Function

- Array Function TRANSPOSE

Section 6 . Functions for working with Text

- PROPER UPPER LOWER LEFT RIGHT MID

- Text and String Function

- FIND CLEAN REPT CONCATENATE

2 Microsoft Excel - Advanced

Section 7. Pivot Tables

- Pivot Tables
- Pivot Table Filter Slicer
- Pivot Charts

Section 8. Names and Dynamic Range

- Naming a Cell and a Range
- Names Dynamic Ranges

Section 9 . Auditing and Trouble Shooting formulas

- Auditing Toolbar
- Auditing Toolbar Base File
- Watch Window
- Watch Window Base File

2 Microsoft Excel - Advanced

Section 10. Form Controls

- Group Boxes and Options Button
- Group Boxes and Options Button Base File
- Check Boxes
- Check Boxes Base File
- List Boxes and Combo Boxes
- Scroll Bar and Spinners

Section 11. Important Excel Tools

- Text to Columns
- Grouping Tabs
- SUBTOTAL Function
- Hyperlinks
- Hyperlinks Base File
- Data Validation
- Random Numbers and other

Section 12.Advanced Charts

- Excel 2010 Sparklines
- Range Charts
- Range Charts Area
- Funding Graph and other

3 Accounting:01 Income Statement

Section 1. Income Statement

- Financial Statements - Fiscal Year Vs Calendar Year
- Income Statement Format
- Calculating Profit Margins
- Non Recurring Items
- Changes In Accounting Estimates
- Final Remarks
- Revenue Recognition - Percentage Completion & Completed Contract
- Revenue Recognition - Installment Method & Cost Recovery
- Depreciation Expense

Section 02. Income Statement Colgate

- Downloading Colgate'S Income Statement
- Analyst Format Of Colgate'S Income Statement
- Formatting The Income Statement
- Investigating The Non-Recurring Charges
- Seperating Non-Recurring Items
- Comparision Of Margins - Before And After Adjustments

4 Accounting:02 Balance Sheet

Section 1. Balance Sheet

- Reference
- Introduction To Balance Sheet

Section 2. Current Assets

- Introduction To Current Assets
- Cash And Cash Equivalents
- Cash And Cash Equivalents - Colgate, P&G, Microsoft
- Accounts Receivables
- Accounts Receivables Case Study
- Inventory
- Inventory - Case Study
- Inventory - Lcm
- Inventory - Colgate and other

Section 3. Financial Reporting Standards

- Financial Reporting Standards

Section 4. Current Liabilities

- Long Term Assets
- Introduction To Goodwill
- Pooling Method Of Accounting
- Purchase Method Of Accounting
- Goodwill Impairment
- Long Term Investments Part 1
- Long Term Investments Continued
- Long Term Investments - Example

Section 5. Long Term Liabilities

- Long Term Liabilities
- Long Term Liabilities - Risk Profile

Section 6. Shareholder'S Equity

- Introduction To Shareholder'S Equity
- Common Stock - Par Value And Apic
- Treasury Stock Or Shares
- Retained Earnings & Dividends
- Additional Other Comprehensive Income
- Introduction To Preference Shares
- Macdonald'S Shareholder'S Equity and other.

5 Accounting:03 - Cash Flows Analysis

Section 1. Cash Flows

- Reference

- Introduction To Cash Flows

- Cfo - Direct Method

- Cfo - Direct Method - Example

- Cfo - Indirect Method

- Cfo - Indirect Method - Example

- Cfi

- Comprehensive Example - Cfo - Direct Method

- Comprehensive Example - Cfo - Indirect Method

- Comprehensive Example - Cfi

- Comprehensive Example - Ending Cash Balance

6 Corporate Valuation - Beginner to Pro in Microsoft Excel

Section 1. Corporate Valuations - Overview

- Corporate Valuations - Overview

Section 1. Dividend Discount Model (Ddm)

- Ddm - Dividend Discount Model- Intrinsic Value
- Ddm - Dividend Discount Model- Required Rate Of Return
- Ddm - Dividend Discount Model- Compare Intrinsic And Market Price
- Ddm - Intrinsic Value Of Growth Companies
- Ddm - Dividend Discount Model- Present Value

Section 3. Discounted Cash Flows (Dcf)

- Introduction To Dcf
- Forecasting Income Statement Ebitda
- Understanding The Working Capital
- Completing The Working Capital Calculations
- Linking The Free Cash Flow To Firm Fcff
- Discounting The Explicit Period Cash Flows
- Calculation Of Terminal Values
- Dcf Valuation Summary
- Dcf Sensitivity Analysis
- Understanding The Capital Structure
- Options Treasury Stock Method
- Options Explained and other

Section 4. Calculating Enterprise Value Ev

- Enterprise Value Calculation Completing The Missing Links

6

Corporate Valuation - Beginner to Pro in Microsoft Excel

Section 5. Relative Valuations - Enterprise Valuation & Equity Value

- Introduction To Relative Valuation
- Relative Valuations Enterprise Value And Equity Value
- Relative Valuations Comparable Comp Sheet
- Understanding Pe Ratio
- Forward And Trailing Pe
- Advantages And Limitations Of Pe
- Understanding Pbv Ratio
- Why Pbv Is Used In Banks and other

Section 6. Reference

- Introduction to Valuation
- Dividend Discount Module
- Introduction to DCF
- FCFF FCFE Example
- Detailed view on Calculating FCFF
- Terminal Value Perpetuity Growth and Exit Multiple Method and other.

7 Financial Modeling of Siemens AG

Section 1. Introduction to Financial Modeling Course Outline

- Introduction to Financial Modeling Course Outline

Section 2. Framework and Prerequisites

- What is Financial Modeling
- Framework of the Model
- Prerequisites
- Prerequisites Continues

Section 3. Requirements

- Model Requirements
- More on Requirements

Section 4. Defining the Need

- Defining the Need
- Defining the Need Continues
- Defining the User
- Bottom Up Curses Top Down
- Defining the Macro Environment
- Impact of Brexit
- Defining the Sector
- About the Company
- Understanding Accounting Equations

Section 5. Starting the Case Study

- Starting the case study
- More on Starting Case Study

Section 6. Populating the Historical

- Populating the Historical

Section 7. Projecting Income Statement

- Projecting Income Statement
- More on Projecting Income Statement
- Key Data on Siemens

Section 8. Working Capital Schedule

- Working Capital Schedule
- Property, Plant and Equipment
- Understand Intangible Assets
- Depreciation Schedule
- Long Term Debt

7 Financial Modeling of Siemens AG

Section 9 . Cash Flow Statement

- Working on Cash Flow Statement
- More on Cash Flow Statement
- Short Term Debt
- Interest Income

Section 10. Calculation

- Basic Shares Calculation

Section 11. Requirements

- Model Requirements
- More on Requirements

Section 12. Checking Errors and Breaking Circularity

Checking Errors

More on Checking Errors

Breaking Circularity

Identify Line Items

Section 13. Ratio Analysis

- Ratio Analysis

Section 14. Sensitivity Tables and Scenario Analysis

- Sensitivity Tables
- More on Sensitivity Tables
- Scenario Analysis

Section 15. DCF

- DCF Introduction
- Best Practices
- More on Best Practices
- Common Mistakes
- Common Interview questions
- Common Interview questions Continues
- PDF,PPT and Excel

8 Conversion Rate Optimization (CRO) - Beginners

Section 1. DCF - Discounted Cash Flow

- Introduction

Section 2. Absolute Valuation

- Course Outline
- Valuation Methodologies
- Relative Valuation

Section 3. DCF

- Basic Concepts of DCF
- Understand DCF Method
- More on DCF Method
- Using Concept of Terminal Value
- Common Trade of DCF Value
- Types of DCF
- Important Accounting Equations

Section 4. DCF Advantages

- Starting with the Case Study
- Predicting the Cash Flows
- Case Study Explained
- Predicting Terminal Values
- Methods to Calculate Terminal Values
- Case study Step 2 Explained
- Working on DCF Explain

Section 5. Net Debt and Cost of Debt

- Net Debt
- Cost of Debt
- More on Cost of Debt
- Cost of Equity

Section 6. Beta

- Understand Beta
- Beta Continues
- Finalizing the case study
- Creating a Sensitivity Table
- Concluding the Analysis
- Common Interview Questions

Section 7. Practice files

- Practice files

9 Comparable Comps - Comparable Company Analysis

Section 1 .Introduction

- Introduction to Comparable Comps
- Valuation Methodologies

Section 2. Why Comps

- Course Outline
- Valuation Methodologies
- Relative Valuation

Section 3. Selecting the Peers

- Steps of Comparable Comps
- Selecting the Peers

Section 4. Selecting the Multiples

- Selecting the Multiples
- Working on Basic Share Outstanding
- Diluated Share Outstanding
- Cash and Cash Equivalents
- Financial Average
- Price by Book Value Multiple
- LTM Calculation Examples

Section 5. Drawing the Comps Sheet

- Gathering the Data
- Gathering the Data Continues
- Drawing the comps sheet

Section 6. Takeover Premium

- Takeover Premium
- More on Takeover Premium

9 Comparable Comps - Comparable Company Analysis

Section7 .REIT Valuation

- REIT Valuation

Section 6. Takeover Premium

- Takeover Premium
- More on Takeover Premium

Section 7. Common Interview Questions

- Common Interview Questions

Section 8. Practice files

- Practice Files

- Gathering the Data
- Gathering the Data Continues
- Drawing the comps sheet

10 Comprehensive Relative Valuation Training

Section 1. Introduction

- Introduction to Relative Valuation

Section 2. Types and Advantages and Disadvantages

- Types of Relative Valuation
- Advantages and Disadvantages
- Earning and Book Multiples

Section 3. Takeover Premium

- Understand EV Ratio
- Finding List of Public Company
- PE Ratio
- Advantages and Disadvantages of PE Ratio
- Equity Value
- PBV Ratio
- Price to Sales Ratio
- Advantages and Disadvantages of PS Ratio and other.

Section 4. Practice Files

- Practice Files

11 Equity Research Report Writing

Section 1. Introduction To Report Writing

- Report Writing - Course Objectives

Section 2. Understanding Sell Side Reports

- Sell Side Research Reports
- Category Of Sell Side Reports

Section 3. Data Analysis

- Data Analysis

Section 4. Developing Logic Using Minto'S Pyramid Principle

- Developing Logic - Minto'S Pyramid Principle
- Minto'S Pyramid Principle - Box Inc Ipo Example
- Minto'S Pyramid Principle - Investment Example

Section 5. Writing Research Report

- Anatomy Of Research Report
- Example Of Good / Bad Reports
- Why Reports Fail
- Dos & Don'Ts Of Equity Reseach Report
- Research Report Standardization
- Case Study - 1
- Case Study - 2
- Case Study - 3
- Understanding Readability Statistics

Section 6. Report Writing - Conclusions

- Report Writing - Conclusions

Frequently Asked Questions

Why should I do this Equity research training course?

You shouldn't if you want to pursue something else. But if you want to build a career in equity research, this course is the most significant one you would ever do.

How much time do I need to invest after doing the course?

This Equity research course is something that you can take on again and again and again. And perfection depends on how much you work on yourself and the materials you receive.

Customer Reviews

"

The course was up to the mark, Only relevant was taught in the course, as said in the introduction. The Minto's Pyramid approach was a nice and a useful method, which would be handy in making all projects/Reports. The readability statistics was also interesting and completely new. Great work by the content creator.

Prateek Chawla

"

Good course. I liked the examples. The Instructor is best, He communicates information exceptionally clearly and efficiently, adds humor, and uses relevant examples to make connections between course material and the real world. I have nothing bad that I can think of to say about his style of and proficiency at teaching. I would recommend this course to those looking to take this course

José Agostinho Pedro

Incredibly informative and easy to follow. Excellent overview of critical components with complete and thorough instruction. All topics addressed in clear and concise manner. Case studies helped to tie all aspects of the instruction together. A complicated topic presented in an easy to understand and follow package. Also appreciated the added instruction of using Microsoft Word tools to aid in assessing writing quality.

Brandon Hall

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For Queries please contact:

Email : info@educba.com