

## Intelligent Investing for Everyone (Online)– Program Topics

The Intelligent Investing for Everyone program curriculum covers the following topics:

### **Module 1 | Fundamentals of Corporate Value Creation**

The program begins with an overview of corporate valuation. Investors often seek to identify when a company's stock price is overvalued or undervalued and why. We will explore the drivers of corporate valuation and the role of financial data analysis in making investment predictions.

### **Module 2 | Using Financial Data for Forecasting**

Using information from a company's financial reports, we can assess its past performance. Coupled with forecasts of growth and profitability, investors can make more informed decisions. In this module, you will learn the fundamentals of financial data analysis and analyze how profitability and growth strategies can impact corporate valuation, thereby influencing investor behavior.

### **Module 3 | Financial Engineering**

Companies often issue new shares or buy back existing shares. When a stock is overpriced or underpriced, these activities can affect the value of their shares. In this module, you will learn how companies use these issuances and buybacks strategically to engineer value for themselves and their shareholders.

### **Module 4 | The Long and Short of Financial Data Analysis**

Investors often use short selling to speculate when a stock's price will decrease. However, their opinions on a stock's price tend to vary. This is when information is power. Explore how real-time investment decision-making helps to level the playing field between Wall Street and Main Street.

### **Module 5 | Blockchain (R)evolution**

Blockchain, the technology behind bitcoins, is changing the world. We apply the fundamentals of blockchain technology to evaluate its applications for corporations and the finance sector. Based on our explorations, we will be able to make informed decisions around investments in corporations and initial coin offerings.

### **Module 6 | Big and Alternative Data**

Professional investors and financial analysts are always looking for new and alternative sources of data. Access to and effective analysis of these alternative data sources can give them an edge over other investors. Explore some creative ways to enhance your data sources. Application exercises give you the option to either learn how to analyze crowdfunding data or create a simple visualization that can inform investment decisions.

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The Intelligent Investing for Everyone program curriculum covers the following topics:

### **Module 7 | Machine Learning and AI Applications in Finance**

ML and AI have made significant inroads into the financial landscape. In this module we present an overview of AI/ML and evaluate some of their applications in the finance arena. Based on this evaluation, we will analyze the impacts of AI and ML on the respective outcomes of both professional and personal investors.

### **Module 8 | Financial Technologies: Past, Present, and Future**

Explore the significance of financial technologies (or fintech) in helping to improve financial outcomes for everyday investors. We will examine the opportunities and the risks of 12 fintech solutions that address financial inequality—and seek to level the playing field. This will allow us to analyze the growth strategy of startups in the fintech space and determine which are most suitable for investment.