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COURSE BROCHURE

MBA Finance Essentials for Investment Decisions Training Course

3 – 7 May 2027
New York

MBA Finance Essentials for Investment Decisions Training Course

Ref: 2158_79597 **Date:** 3 – 7 May 2027 **Location:** New York **Fees:** 7900 GBP

MBA Finance Essentials for Investment Decisions is a 1-week training course for functional and operational managers who must read the numbers behind a proposal, test it and argue for or against it, ending with an Investment Decision Finance Briefing. Boards and executive committees now expect every manager to speak the language of returns, cash and risk before capital is committed. Jupiter Prime Training delivers MBA Finance Essentials as a condensed grounding in corporate finance.

Why MBA Finance Essentials Matters Now

Two forces shape how managers meet finance today. Higher borrowing costs have raised the hurdle every project must clear, so weak cases are exposed sooner. Investors and lenders also read cash generation more closely than reported profit. An organisation whose managers handle these well approves fewer value-destroying projects and defends good ones with confidence; one that does not commits capital on intuition. The course rests on discounted cash flow, the weighted average cost of capital WACC and ratio analysis as its core models.

Who Gains Most from MBA Finance Essentials

- Managers who sponsor capital requests and must defend them before an investment committee
- Department heads who own an operating budget and explain variances each month
- Project and engineering leads whose proposals depend on cost, payback and return estimates
- Commercial managers who weigh pricing, contracts and customer terms against cash impact
- Newly promoted leaders moving from a technical role into profit-and-loss responsibility

A cross-functional leadership group gains most when several members attend together, because they leave with one shared vocabulary for debating capital requests.

MBA Finance Essentials Capabilities

Participants move from reading a set of accounts to judging whether a specific investment earns more than the capital it consumes.

- Analyse an income statement, balance sheet and cash flow statement together — the sponsor reviewing unit health
- Calculate liquidity, efficiency and return ratios against peers — the committee comparing divisions
- Build a driver-based budget and explain variances — the finance partner agreeing next year's targets
- Apply net present value, internal rate of return and payback — the decision to approve, defer or reject a project
- Estimate a cost of capital suited to a project's risk — the hurdle rate set for a proposal
- Communicate a valuation range and its key assumptions — the executive weighing an acquisition or disposal

Key MBA Finance Essentials Terms

- Free Cash Flow — cash left after operating costs, tax and capital spending.
- Working Capital — current assets minus current liabilities.
- Net Present Value — the sum of a project's future cash flows discounted to today, less the initial outlay.
- Weighted Average Cost of Capital — the blended return required by lenders and shareholders.
- Return on Capital Employed — operating profit divided by the capital used to earn it.
- Sensitivity Analysis — testing how a result changes when one assumption moves up or down.

MBA Finance Essentials Day by Day

Day 1: Reading the Financial Statements

- Income Statement Structure — Separating Operating Profit From One-Off Items
- Balance Sheet Logic — Linking Assets to the Funding Behind Them
- Cash Flow Statement — Explaining Why Profit and Cash Diverge
- Accruals and Depreciation — Judging Earnings Quality Before Approving Spend
- Three-Statement Linkage — Tracing One Transaction Through Every Report

Day 2: Ratios and Performance Diagnosis

- Liquidity and Solvency Ratios — Assessing Capacity to Carry New Commitments
- Efficiency Ratios and the Cash Conversion Cycle — Releasing Trapped Cash
- Return Ratios and Margin Trees — Locating the Drivers of Profitability
- Peer Benchmarking — Comparing Divisions or Competitors on a Common Basis
- Ratio Red Flags — Spotting Distress Signals in Supplier or Partner Accounts

Day 3: Budgeting and Cost Behaviour

- Fixed, Variable and Step Costs — Forecasting Spend as Activity Changes
- Break-Even and Contribution Margin — Setting Volume Targets for New Offers
- Driver-Based Budgeting — Tying Resource Requests to Operational Activity
- Variance Analysis — Explaining Gaps Between Budget and Actual Results
- Rolling Forecasts — Reallocating Resources When Conditions Shift

Day 4: Appraisal, Cost of Capital and Valuation

- Time Value of Money and Discounting — Comparing Cash Received at Different Points
- Net Present Value, Internal Rate of Return and Payback — Ranking Competing Projects
- Weighted Average Cost of Capital — Setting a Risk-Adjusted Hurdle Rate
- Discounted Cash Flow and Multiples Valuation — Pricing a Business or Unit
- Scenario and Sensitivity Testing — Showing Which Assumptions Move the Answer

Day 5: Practising the Investment Decision Finance Briefing

- Case Diagnosis From Statements and Ratios — Framing the Investment Question
- Budget Impact Mapping — Showing Effects on Next Year's Operating Plan
- Appraisal Model Build — Presenting Value, Return and Payback Side by Side
- Risk and Funding Options — Choosing Between Debt, Equity and Internal Cash
- Investment Decision Finance Briefing — Recommending Approve, Defer or Reject

Applying MBA Finance Essentials After the Course

- Re-run the appraisal of one live capital request using net present value and a sensitivity table.
- Lead a working-capital review of a unit, using the cash conversion cycle to set one target for receivables or stock.

MBA Finance Essentials Questions FAQ

What is MBA Finance Essentials and why does it matter now?

MBA Finance Essentials is the core corporate finance an MBA teaches, condensed for managers. It matters now because higher capital costs make every proposal prove its cash return.

Which roles gain most from MBA Finance Essentials?

Managers who sponsor capital requests, own budgets or move into profit-and-loss roles gain most. They build proposals committees can test and accept.

How does MBA Finance Essentials differ from a longer finance mini MBA?

MBA Finance Essentials covers the decision-critical core in one week. A longer finance mini MBA adds sector strategy, capital structure, treasury and leadership modules.

What do you bring back from MBA Finance Essentials?

You bring back a finance briefing for a real or realistic investment decision. It combines diagnosis, appraisal and a clear recommendation.

MBA Finance Essentials: The Way Forward

The Investment Decision Finance Briefing gives each participant a tested structure for the next capital request on their desk. Its first use is usually an approve-or-defer call on a pending project, read by sponsors and finance partners alike. After that first decision, revisit the hurdle rate and the key sensitivities, since both shift as funding conditions and operating results change.