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## **Syllabus: Investment Project Preparation and Appraisal**

### **Course 1: Introduction to Investment Projects and Market Analysis**

#### **Theme 1.1: Introduction - Investment Project Development**

This training module is aimed to facilitate the following learning objectives:

- Understand the definition of investment and the types of investments
- Learn about the investment project development process and the components of the investment project development process
- data sources to identify business opportunities, screening projects and the various pre-investment studies undertaken in the early stages of investment project identification
- Provides an understanding of the phases in investment projects and the macro and micro economic contexts of investment decisions

#### **Theme 1.2: Investment Opportunity Identification**

This training module is aimed to facilitate the following learning objectives:

- Understand the investment project identification process
- Learn about the data sources to identify business opportunities, screening projects and the various pre-investment studies undertaken in the early stages of investment project identification
- Provides an understanding of what constitutes a business opportunity
- Identifying prospective investment project opportunities and evaluating them for establishing new business ventures - entrepreneurship and the entrepreneurship life cycle

#### **Theme 1.3: Introduction to Market Analysis and Marketing**

This training module is aimed to facilitate the following learning objectives:

- Learn and understand market analysis procedures and market research
- Identify the project's market environment and product life cycle
- Understand demand and supply analysis
- Learn how to design the marketing program for the investment project's output(s)

#### **Theme 1.4: Marketing Strategy**

This training module is aimed to facilitate the following learning objectives:

- Learn the elements of the marketing strategy



- Understand the product, pricing strategies and distribution strategies
- Identify the strategic aspects of marketing for an investment project's output

### **Theme 1.5: Impact Entrepreneurship**

This training module is aimed to facilitate the following learning objectives:

- Understand the fundamentals of impact entrepreneurship and the need for entrepreneurial finance, including practical guidelines for entrepreneurial development activities such as designing a business model and a business plan for pitching to investors
- Learn about the correlation between entrepreneurship and SDGs and ESG frameworks on measurement of impact of investment projects
- Learn about the stakeholders' engagement for SDGs and the different categories of investors
- Understand the basics of impact investing for funding of sustainable development activities, and impact returns and measurement
- Understand impact investors and the growth of the impact investing market in response to the need for capital by entrepreneurs especially in developing economies.
- Learn the relationship between entrepreneurship and gender, impact investing and venture philanthropy

### **Course 2: Technical Analysis**

#### **Theme 2.1: Technical Analysis – Design and Planning**

This training module is aimed to facilitate the following learning objectives:

- Understand the need for technical analysis
- Learn the processes of technical analysis technical specifications of the product or investment opportunity deliverable, planning the investment opportunity for further development, simulate operational technical guidelines, and the decommissioning phase at the end of the project horizon
- Identify the factors influencing technology and the scope of technical analysis

#### **Theme 2.2: Technical Analysis – Implementation**

This training module is aimed to facilitate the following learning objectives:

- Obtain a general overview of the implementation and operation of technical analysis
- Understand the plant design, project inputs, estimation of machinery and equipment as well as production program



- Learn the principles of HR management, location and site selection, and the content technical assessment report

### **Theme 2.3: Environment Analysis**

This training module is aimed to facilitate the following learning objectives:

- Learn about the environmental impact assessment
- Understand how investment projects are analysed against their impact on the environment
- Analyse and identify the basic flowchart used in environmental analysis, the importance of the assessment in a feasibility study and the methods and activities of impact assessment process

### **Course 3: Financial Planning and Analysis**

#### **Theme 3.1: The Need for Capital and Sources of Financing**

This training module is aimed to facilitate the following learning objectives:

- Understand the general overview of the investment costs and sources of finance
- Learn the basic of types of industrial investments and the main elements of financial analysis
- Learn about debt financing and equity financing, including the various elements of financial appraisal of investment projects, illustrating the calculation of production expenditures and working capital
- Identify and describe the different types of investments and sources of finance and calculating production costs and working capital

#### **Theme 3.2: Introduction to Financial Statements**

This training module is aimed to facilitate the following learning objectives:

- Provide an overview about the financial component of business plan, that is understand the various financial statements including the income statements, balance sheet and cashflow statements.

#### **Theme 3.3: Financial Statements and Ratio Analysis**

This training module is aimed to facilitate the following learning objectives:

- Understand the overview of the financial statements with a special focus on ratio analysis and the time value of money.
- Describe and explain the basics of profitability, liquidity as well as financial leverage ratios.

- Obtain the elementary knowledge about the time value of money in simulation of proforma financial statements , calculation of static indicators of financial performance

### **Theme 3.4: Financial Analysis - Dynamic Indicators**

This training module is aimed to facilitate the following learning objectives:

- Obtain a general overview of the dynamic indicators such as the operating cashflows (OCFs), net present value (NPV), the payback period and the internal rate of return (IRR)
- Learn about the various dynamic indicators, such as dynamic payback, net present value, internal rate of return, and net present value ratio
- Understand the principles of how to compute and use them dynamic indicators in financial analysis
- Understand the the concept of capital rationing in developing financial plans

### **Course 4: Risk Analysis, Project Implementation Planning and Appraisal**

#### **Theme 4.1: Risk Analysis - Dealing with Uncertainty in Project Appraisal**

This training module is aimed to facilitate the following learning objectives:

- Understand risk analysis with a great focus on dealing with uncertainty in project appraisal
- Learn about the principles of qualitative risk assessment and quantitative measurement of risk
- Learn about risk immunization and sensitivity analysis
- Learn about the capital asset pricing model (CAPM) and portfolio risk
- Describe and explain foreign investors and their sensitivity to risk in making financial decisions

#### **Theme 4.2: Project Implementation Planning and Appraisal**

This training module is aimed to facilitate the following learning objectives:

- Learn about the basics of project implementation plan
- Identify the key elements of the project implementation plan
- Understand the project appraisal process and drafting the project appraisal report
- Obtain an understanding on estimation of activities duration and calculation of implementation costs, incorporating stakeholders' concern in the appraisal report and contents of the appraisal report.