

AI in Finance

Where Finance Meets Artificial Intelligence.



15000+ Happy
Students



Best in Online & Offline
Training Experience



Industry Recognized
Expert Mentors

Program Curriculum

Module 1-The AI Revolution in Finance

1.1.Evolution of Finance Functions

- Traditional Finance vs AI-Enabled Finance
- How Finance Roles Are Changing
- Future of Finance Teams

1.2 Understanding AI Landscape

- Artificial Intelligence
- Machine Learning
- Generative AI
- Large Language Models (LLMs)
- AI Agents

1.3 What Finance Professionals Need to Learn

- Skills becoming obsolete
- Skills becoming more valuable
- AI + Human Collaboration Model

Activity

- Identify tasks participants spend most time on
- Map AI opportunities



Module 2: Prompt Engineering for Finance

2.1 Prompt Engineering Fundamentals

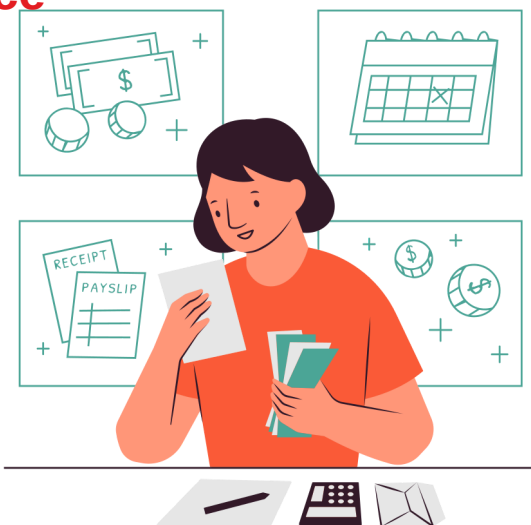
- The Finance Prompt Formulas

2.2 Advanced Prompting Techniques

- Zero Shot Prompting
- Few Shot Prompting
- Chain of Thought Prompting
- Multi-Step Reasoning
- Scenario-Based Prompting

2.3 Building a Finance Prompt Library

- Corporate Finance Prompts
- Financial Modelling Prompts
- Investment Banking Prompts
- Equity Research Prompts
- Reporting Prompts



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Module 3: GenAI in Financial Statement Analysis

3.1 Income Statement Analysis

Revenue Analysis

- Growth Drivers
- Segment Analysis
- Margin Trends

Expense Analysis

- Fixed vs Variable Costs
- Cost Optimization Opportunities

3.2 Balance Sheet Analysis

- Liquidity Analysis
- Working Capital Analysis
- Capital Structure Review
- Debt Analysis

3.3 Cash Flow Analysis

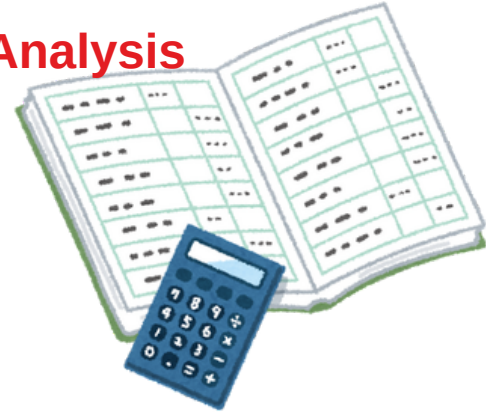
- Operating Cash Flow Review
- Free Cash Flow Analysis
- Cash Conversion Cycle Analysis

3.4 AI-Powered Ratio Analysis

- Profitability Ratios
- Liquidity Ratios
- Efficiency Ratios
- Solvency Ratios
- Return Ratios

Hands-On Exercise

Analyse annual report of: INFOYSYS



Module 4: GenAI in Corporate Finance & FP&A

4.1 Budgeting Automation

- Traditional Budgeting Challenges
- AI-Assisted Budget Preparation
- Budget Assumption Generation
- Budget Commentary Creation

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4.2 Forecasting Applications

- Revenue Forecasting
- Expense Forecasting
- Headcount Planning
- Cash Forecasting

4.3 Variance Analysis

- Actual vs Budget
- Actual vs Prior Year
- Forecast vs Actual
- Root Cause Identification

4.4 Decision Support

- Investment Decisions
- Capital Allocation
- Pricing Decisions
- Product Profitability Analysis

4.5 Management Reporting

- Monthly MIS Reports
- CFO Dashboards
- Board Presentations
- Executive Summaries

Practical Exercise

Convert raw Excel data into:

- CFO Commentary
- Board Note
- Monthly Performance Review

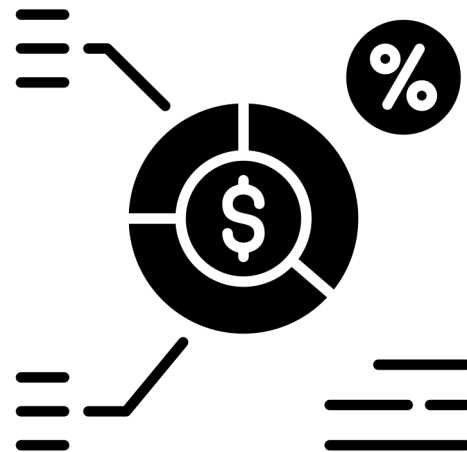
Module 5: GenAI in Financial Modelling

5.1 Financial Model Architecture

- Understanding Model Components
- Assumption Design
- Driver-Based Forecasting

5.2 Three Statement Modelling

- Revenue Build-Up
- Cost Forecasting
- Working Capital Forecasting
- Debt Schedule Forecasting
- Integrated Statements



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5.3 AI-Assisted Forecasting

- Historical Trend Analysis
- Scenario Planning
- Sensitivity Analysis
- Assumption Validation

5.4 Model Auditing

- Formula Review
- Hardcode Detection
- Circular Reference Identification
- Error Checking

5.5 AI for Excel

- Formula Generation
- XLOOKUP
- INDEX MATCH
- Dynamic Arrays
- VBA Creation
- Power Query Automation



Hands-On Case Study

Build Forecast Model for:

- Revenue
- EBITDA
- Free Cash Flow

INVESTMENT BANKING + REPORTING + AI AUTOMATION

Module 6: GenAI in Investment Banking

6.1 Industry Research

- Industry Overview
- Market Size Estimation
- Competitive Landscape
- Industry Drivers
- Industry Risks



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6.2 Comparable Company Analysis

- Peer Selection
- Business Description Drafting
- Multiple Analysis
- EV / Revenue
- EV / EBITDA
- P/E
- P/B



6.3 Precedent Transaction Analysis

- Transaction Screening
- Deal Rationale
- Synergy Analysis
- Premium Analysis
- Transaction Multiples

6.4 DCF Valuation Support

- Revenue Assumptions
- Margin Assumptions
- WACC Inputs
- Terminal Growth Assumptions
- Valuation Commentary

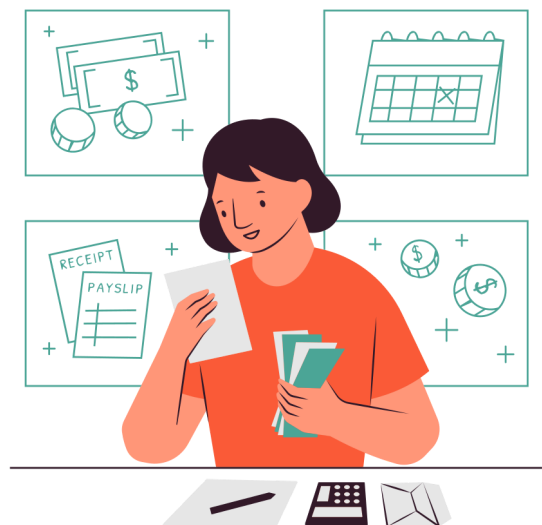


6.5 M&A Advisory Applications

- Target Screening
- Synergy Estimation
- Investment Committee Memo
- Deal Summary Preparation

6.6 Pitchbook Automation

- Company Profiles
- Industry Slides
- Market Maps
- Deal Rationale Slides
- Executive Summary Slides



Hands-On Exercise

Prepare:

- Mini Pitchbook
- Comparable Company Analysis
- DCF Summary

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Module 7: GenAI in Equity Research

7.1 Company Research

- Business Analysis
- Industry Analysis
- Competitive Analysis
- SWOT Analysis

7.2 Earnings Call Analysis

- Management Commentary
- Guidance Changes
- Key Risks
- Growth Drivers

7.3 Investment Thesis Creation

- Bull Case
- Bear Case
- Base Case
- Recommendation Framework



Module 8: GenAI in Financial Reporting & CFO Office

8.1 MIS Reporting Automation

- Monthly Reports
- Quarterly Reports
- Business Reviews

8.2 Board Reporting

- Executive Summaries
- Performance Highlights
- Strategic Insights

8.3 Investor Reporting

- Earnings Summary
- Investor Communication
- Shareholder Updates



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8.4 Narrative Reporting

Convert:

- Excel Data
- Power BI Outputs
- Financial Statements

Into:

- Executive Commentary
- Management Discussion
- Board Notes



Module 9: AI Tools Every Finance Professional Should Know

Research & Analysis

- [ChatGPT](#)
- [Claude](#)
- [Perplexity AI](#)
- [NotebookLM](#)



Productivity

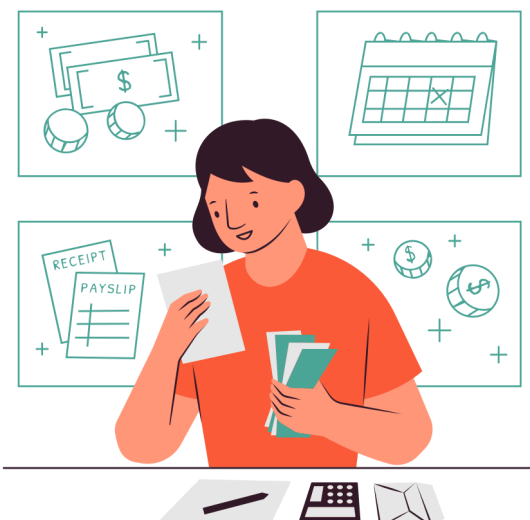
- [Microsoft Copilot](#)
- [Gamma](#)
- [Canva AI](#)

Analytics

- [Power BI](#)
- [Tableau](#)

Automation

- [Zapier](#)
- [Make](#)



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OUR MISSION

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OUR STORY

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