



FINANCIAL STATEMENT ANALYSIS 101

ONE DAY COURSE AUCKLAND

A comprehensive overview of how to interpret and utilise financial information essential to analyse the financial health and commercial performance of your business or that of prospective clients

DATE & TIME

Thursday 8 October 2026
8.30 am - 3.30 pm

WHERE

MUFG Pension & Market Services
PwC Tower, Level 30,
15 Customs Street West, Auckland

ABOUT

A comprehensive overview of how to interpret and utilise financial information essential to analyse the financial health and commercial performance of your business or that of prospective clients.

This one-day course is designed to provide you with a good understanding of financial statements; profit and loss statements; cashflow and trend analysis.

WHO SHOULD ATTEND

Professionals without accounting training who require an understanding of financial statements to assist in their roles, such as:

- those providing debt or equity finance to clients
- lawyers wishing to understand the commercial consequences of legal clauses
- those commencing business unit leadership or governance roles.

BENEFITS & OUTCOMES

Gain confidence and knowledge to interpret and analyse financial statements, including trend analysis to determine the financial “health” and commercial performance of the business or division in question

6 CPD Hours in total



COURSE PRESENTER

DR NAVA RAMEZANIAN, SENIOR LECTURER AT AUT BUSINESS SCHOOL, FINANCE

Nava obtained her PhD in Finance from The University of Auckland in 2020 and has done her undergraduate and postgraduate degrees in Business Economics and Economic Development and Planning.

Nava joined the AUT Business School, Finance Department in August 2019. She has been teaching corporate finance and financial management courses for undergraduate, MBA and Professional Masters programmes. Her research interests include corporate governance, empirical asset pricing and firm performance.

CONTENT WILL INCLUDE

- Business objectives
- Overview of business activities
- The goal of the company
- Assumptions underlying the preparation of financial statements
- Qualitative characteristics of financial statements
- Elements of financial statements - Assets, liabilities, equity, income and expenses
- Financial statements including income statement, balance sheet, cashflow statement and statement of changes in equity
- Balance sheet:
 - Purpose?
 - Uses? Why important?
 - How items are classified?
 - Balance sheet and accounting equation
- Income statement & statement of changes in equity:
 - Purpose?
 - Uses? Why important?
 - How items are classified?
 - Relationship of income and expenses to the accounting equation
 - Changes in equity
- Cashflow statement:
 - Purpose?
 - Uses? Why important?
 - How items are classified?
 - Relationship of income and expenses to the accounting equation
 - A simple cashflow statement
 - Relationship with other statements
- Financial statements & decision-making
- Ratio analysis
 - Solvency or liquidity ratios
 - Financial leverage ratios
 - Asset turnover ratios
 - Profitability ratios
 - Market value ratios
 - Limitations
- Breakeven Analysis and Operating Leverage Structure of costs
 - EBIT & EBIDTA & their importance
 - Cost structure and sensitivity of EBITDA & EBIT to revenue changes
 - Degree of Operating Leverage (Accounting DOL and Cash Flow DOL)
 - Break even points
- Trend analysis
- Case study

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COST

INFINZ Members \$300 + GST
Non-Members \$500 + GST

10% discount for three or more applications from the same organisation.

WEBSITE

www.infinz.com/Site/what_we_are_offering/learninganddevelopment/financial-statement-analysis-101.aspx

TO REGISTER

Contact Faith Taylor on
faith@infinz.com

Places are limited, so will be first-in first-served