



Wall Street Prep



Excel for Finance

Within its continuous pursue to introduce the main training programs related investment companies work, to Investment Studies Center (ISC) @ Union of Investment Companies (UIC), in collaboration with Wall Street Prep is delighted to invite you to a professional program according to the following details:

استمراراً من مركز دراسات الاستثمار لدى اتحاد شركات الاستثمار في تقديم البرامج التدريبية الأساسية لعمل شركات الاستثمار، يسرنا وبالتعاون مع **Wall Street Prep** الإعلان عن تنظيم برنامج تدريبي مهني ودعوتكم للمشاركة فيه، وفقاً للتفاصيل الآتية:

Program:	Excel for Finance	البرنامج:
Instructor:	Jesse Milligan	المحاضر:
Dates:	(Sun. – Wed.) 12 th – 15 th November 2023 (4 Days)	التاريخ:
Timing:	11:00 AM - 03:00 PM	الوقت:
Venue:	Online Virtual Training	المكان:

Course Details, Registration & Fees

تفاصيل البرنامج، التسجيل والرسوم

<http://unioninvest.org/upcomingevents.aspx>

Registration is open according to availability

UIC Members	KWD 295	أعضاء الاتحاد
Non-Members	KWD 350	غير أعضاء الاتحاد



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اتحاد شركات الاستثمار
UNION OF INVESTMENT COMPANIES

Excel for Finance

Excel basics:

- Introduction
- Getting Started
- The Excel Ribbon
- Excel Settings
- Basic Excel Shortcuts, Navigation & Editing
- Formatting in Excel

Navigation within Excel

- Excel Navigation
- Splitting & Freezing Panes

Entering and editing data within Excel

- Entering & Editing Data
- Columns & Rows
- Paste Special
- Ctrl Shortcuts
- Naming Cells



- Anchoring Cells
- Naming Worksheets
- Grouping & Hiding Columns & Rows
- Grouping Workbooks
- Formula Auditing

Basic Excel functions

- Introduction to Functions: SUM & Average
- #Ref, #Div/0! & Other Excel Errors

Logical, date & concatenation functions

- Simple & Nested IF Statements
- IFERROR & Concatenation
- Date Functions: EOMONTH & EDATE
- ISNUMBER, ISTEXT & Combining with IF to Create Overrides
- More Date Functions: YEARFRAC, DAY, MONTH, YEAR & DATE
- AND & OR Functions



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Lookup functions & data tables

- HLOOKUP, VLOOKUP, CHOOSE, OFFSET & INDEX Functions
- Common Errors with HLOOKUP, VLOOKUP, CHOOSE, OFFSET & INDEX
- The MATCH Function
- Combining H/VLOOKUP, OFFSET, INDEX, CHOOSE with MATCH
- Creating Drop Down Menus with Data Validation
- Data Tables
- Cell Alignment & Center Across Selection

Mathematical functions

- The SUMPRODUCT Function
- Advanced SUMPRODUCT: Adding Criteria & Booleans in Excel
- SUMIF/S & AVERAGEIF/S
- CEILING, FLOOR & ABS Functions
- ROUND, ROUNDUP, ROUNDDOWN & COMBIN Function
- The MIN & MAX Functions
- COUNT/A & COUNTIF/S Functions
- Present Value & Future Value Functions
- NPV & XNPV Functions
- IRR & XIRR Functions



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Text functions

- Text Functions (LEN, LEFT, RIGHT, MID, REPLACE, etc.)
- Using Text Functions to Solve Data Extraction Challenges
- Flash Fill (Excel 2013 Only)

Making good use of the indirect function

- Combining INDIRECT with &

Sorting, pivots and filter tables

- Sort & Subtotal
- Autofilter
- Pivot Tables, Part 1
- Pivot Tables, Part 2

VBA, recording macros & custom formatting

- VBA & Macros in Excel
- Creating Dynamic Headers, Custom Formatting & the TEXT Function
- Conclusion

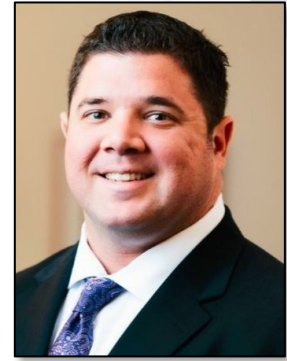


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Instructor: Jesse Milligan

Jesse most recently worked at Medtronic as a Director of Business Development and Strategy. Prior to joining Medtronic, Jesse worked at Piper Jaffray, where he focused on raising equity capital for private companies, leveraging a network of venture capital, growth equity, sovereign wealth, and hedge funds as well as family offices. Jesse earned his MBA from the University of Chicago's Booth School of Business and his A.B. in Economics from Harvard University.



Target Audience

For finance professionals, proficiency in Excel is a fundamental part of the job. This virtual session will teach you how to navigate through worksheets, build formulas and dramatically increase your speed with powerful keyboard shortcuts.