

Private Equity: Financing, Investing, & Value Creation

Duration: 5 Days

Language: en

Course Code: PF1-159

Objective

Upon completion of this course, participants will be able to:

- Provide an in-depth understanding of private equity and its role in corporate finance.
- Equip participants with skills in fundraising, investment analysis, and value-creation strategies.
- Enable participants to analyse and evaluate private equity transactions.
- Enhance decision-making in private equity investment opportunities.
- Prepare participants for managing portfolios and exiting investments.

Audience

This course is ideal for finance, investment, and corporate strategy professionals who want to develop expertise in private equity. It is particularly suited for:

- Investment bankers
- Financial analysts and consultants
- Corporate finance professionals
- Private equity analysts and associates
- Venture capitalists
- Mergers and acquisitions (M&A) advisors
- Business development managers
- Entrepreneurs and business owners interested in PE funding

Training Methodology

The training course adopts an interactive and practical learning approach. It incorporates a blend of lectures, case studies, and real-life examples of private equity transactions. Participants will engage in group discussions and activities to enhance their understanding of private equity financing and investing.

The course includes scenario-based exercises, during which participants will work on structuring deals, assessing risks, and identifying value-creation opportunities. These exercises mirror real-world private equity activities, providing hands-on experience with the tools and techniques commonly used by private equity professionals.

Participants will also have access to online resources, including reading materials, case studies, and practice exercises to support their learning journey. The course encourages self-paced learning, with supplementary resources available for those preparing for exams or certifications in private equity and corporate finance.

Summary

The Private Equity: Financing, Investing, and Value Creation training course is designed to provide participants with a thorough understanding of the private equity (PE) landscape. The course delves into the fundamental principles of private equity, including how funds are

raised, how investments are selected, and the mechanisms through which value is created. This knowledge is essential for professionals seeking to enhance their skills in financial analysis, investment strategies, and value creation within the private equity market.

This training covers the entire private equity investment lifecycle, from fundraising to the exit phase. Participants will explore the various stages of financing, gain insights into deal structuring, and understand the key factors that drive value creation. The course also deepens into market trends, portfolio management, and strategies to maximise investment returns.

Designed for finance, investment banking, and corporate strategy professionals, the course aims to bridge the gap between theory and practice. Case studies and real-world examples provide a practical perspective on how private equity firms operate, enabling participants to apply the concepts they learn to their investment decisions.

By the end of the course, participants will have gained a comprehensive understanding of the private equity process, positioning themselves to make more informed decisions about financing, investing, and growing businesses in competitive markets. This course is essential for anyone aspiring to work in private equity, mergers and acquisitions, or corporate finance.

Course Content & Outline

Section 1: Introduction to Private Equity

- Overview of private equity and its importance in the financial ecosystem
- The structure of private equity firms and funds
- Understanding limited partners (LPs) and general partners (GPs)

Section 2: Fundraising and Capital Structure

- The private equity fundraising process
- Capital structures and funding sources
- Role of institutional investors in private equity
- Regulatory and legal considerations in fundraising

Section 3: Investment Strategies and Deal Structuring

- Types of private equity investments (venture capital, buyouts, growth capital)
- Due diligence processes and risk assessment
- Deal structuring and negotiation techniques
- Leveraged buyouts (LBOs) and recapitalisation

Section 4: Value Creation in Private Equity

- Operational improvements and restructuring
- Strategic management and value drivers in portfolio companies
- Financial performance enhancement and profitability improvement
- The role of the board in private equity-backed companies

Section 5: Portfolio Management and Exit Strategies

- Monitoring and managing portfolio companies
- Performance measurement and reporting
- Exit strategies: Initial Public Offering (IPO), trade sales, and secondary buyouts
- Maximising returns and minimising risks at the exit phase

Certificate Description

Upon successful completion of this training course, delegates will be awarded a Holistique Training Certificate of Completion. For those who attend and complete the online training course, a Holistique Training e-Certificate will be provided.

Holistique Training Certificates are accredited by the British Assessment Council (BAC) and The CPD Certification Service (CPD), and are certified under ISO 9001, ISO 21001, and ISO 29993 standards.

CPD credits for this course are granted by our Certificates and will be reflected on the Holistique Training Certificate of Completion. In accordance with the standards of The CPD Certification Service, one CPD credit is awarded per hour of course attendance. A maximum of 50 CPD credits can be claimed for any single course we currently offer.

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Tags

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