معاً نصنع الأثر
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الأكاديمية المالية
THE FINANCIAL ACADEMY

AI in Equity Research

الذكاء الاصطناعي في أبحاث الأسهم



Training Partner



24 JAN 2027 | **04 DAYS** | **In-Person**

ENGLISH | **RIYADH** | **6,900**

OVERVIEW

The program adopts an interactive, practice-oriented learning methodology that combines specialized knowledge, global best practices, and practical applications relevant to the Saudi capital market, tailored to participants' professional experience. Delivered over four training days, the first two days focus on advanced AI concepts and applications in equity research through interactive presentations, professional discussions, and case studies involving Saudi-listed companies. The third day features hands-on training at the Financial Academy's Bloomberg Lab, enabling participants to apply AI tools to financial data analysis and investment research. The program concludes with an interactive day featuring a keynote speaker and a panel discussion with industry experts and research leaders, providing opportunities to exchange insights and explore emerging trends, challenges, and future opportunities in equity research, while strengthening the connection between knowledge, practical application, and professional practice.



Program Objectives

- Apply AI with a disciplined research method
- Analyze Saudi market data and disclosures
- Apply regulatory and ethical controls for AI use
- Prepare alternative data to support investment theses
- Analyze financial performance and value companies with AI support
- Apply Bloomberg AI tools in investment analysis
- Prepare research notes and an AI adoption roadmap

Learning Outcomes

- Apply AI in equity research and validate its outputs
- Analyze Saudi market data and corporate disclosures
- Apply responsible AI practices and protect information
- Leverage alternative data and sentiment analysis
- Enhance financial analysis and valuation using AI
- Produce comprehensive investment research using Bloomberg

Target Audience

- Equity research analysts (sell-side and buy-side).
- Portfolio and investment analysts.
- Assistant portfolio and fund managers.
- Financial advisors and investor relations analysts.
- Data analysts in capital market institutions.

DAY ONE

9:00 AM – 9:15 AM

Welcome and program opening

Session 01| 9:15 AM – 11:00 AM

The Future of Equity Research in the AI Era:

- AI, machine learning, and LLM fundamentals
- The changing role of the equity analyst
- Structured prompting and validating AI outputs

11:00 AM – 11:30 AM

Break

Session 02 | 11:30 AM – 1:30 PM

Researching the Saudi Market: Data, Disclosures & Arabic Content

- Saudi market structure and local data sources
- AI analysis of Arabic disclosures and earnings calls
- Case study: a Saudi-listed company's disclosures

1:30 PM – 1:45 PM

Break

Session 03 | 1:45 PM – 3:00 PM

Responsible AI in Investment Research

- SDAIA AI principles and the PDPL
- Protecting inside and confidential information
- IOSCO guidance and CFA Institute standards

DAY TWO

Session 04| 9:00 AM – 11:00 AM

Alternative Data & Sentiment Analysis

- Global and local alternative data sources
- Sentiment analysis of news and Arabic content
- Case study: point-of-sale data and retail revenue

11:00 AM – 11:30 AM

Break

Session 05 | 11:30 AM – 1:30 PM

AI-Powered Financial Analysis & Earnings Forecasting

- AI-assisted financial statement analysis
- Earnings forecasts vs. consensus
- Case study: post-earnings summary for a Saudi company

1:30 PM – 1:45 PM

Break

Session 06 | 1:45 PM – 3:00 PM

AI-Enhanced Valuation & the Limits of Trust

- AI in DCF and multiples valuation
- Saudi specifics: Zakat, oil prices, and banks
- Case study: spotting AI errors in a valuation model

Classroom Sessions | Discussion Groups \ Activity | Time | Break/Meal

DAY THREE (Bloomberg Lab)

Session 07| 9:00 AM – 11:00 AM

Bloomberg AI Tools for Equity Research

- ASKB research queries and source verification
- AI news summaries and earnings analysis
- Company document search and analysis

11:00 AM – 11:30 AM

Break

Session 08 | 11:30 AM – 1:30 PM

Hands-on Saudi Equity Workflow

- Screening Saudi equities for investment ideas
- End-to-end company analysis with Bloomberg
- BQL to Excel and reusable ASKB Workflows

1:30 PM – 1:45 PM

Break

Session 09 | 1:45 PM – 3:00 PM

From Analysis to Research Note

- AI-assisted research notes in Arabic and English
- Research reporting and disclosure standards
- Roadmap for adopting AI in research teams

DAY FOUR

Session 10 | 9:00 AM – 10:00 AM

Keynote Session

The future of AI in investment management

Session 11 | 10:00 AM – 11:00 AM

Panel: AI in Research Teams, from Experimentation to Adoption

- Saudi and global heads of research
- Adoption challenges and best practices

11:00 AM – 11:30 AM

Break

Closing | 11:30 AM – 12:00 PM

Closing Ceremony

Certificate presentation

Classroom Sessions | Discussion Groups \ Activity | Time | Break/Meal

About the Financial Academy

Excellent Work Groups



Training at the Financial Academy gives you the opportunity to join and interact with carefully selected groups of peers who work at different organizations and job levels. This pool of diverse perspectives will enrich your learning experience and expand your professional network within the financial sector.

An Optimal, Have-It-All Learning Environment



The Academy's facilities provide a unique learning environment with high-quality training rooms equipped with cutting-edge technology, spacious shared lounges, dining facilities, and a variety of other amenities. Prayer rooms for both men and women are also available.

Easy-to-Reach Offices

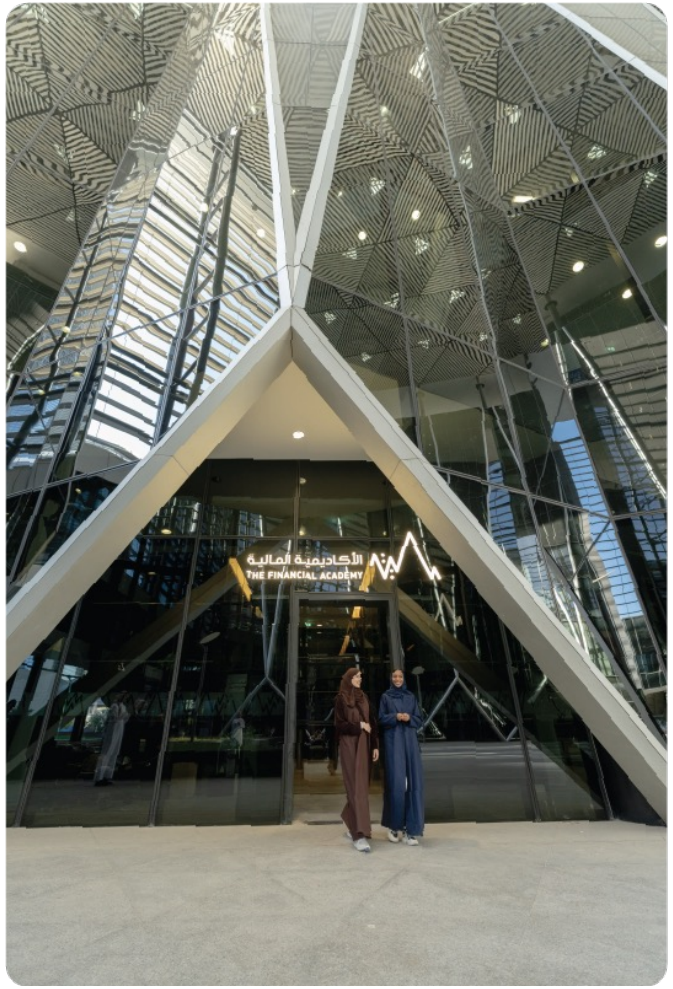


The Financial Academy is easily accessible, being directly connected to King Abdullah Financial District (KAFD) Metro Station via a pedestrian bridge. It is alternatively easy to reach using ride-hailing apps or private cars: Once you get to KAFD, head to Building No. 2.07 through Area 2.

At the Heart of KAFD



Located in KAFD, where many financial sector organizations are based, the Financial Academy enjoys a unique and strategic location. In addition, the area is known as a business and entertainment hub with many cafés and restaurants, making the learning experience more enjoyable thanks to its vibrant surroundings.



Connecting and Learning

Though it comes from within, transformation often requires a catalyst. And for many business leaders, the Financial Academy (FA) professional training programs and development activities have been that catalyst. Here, you're fully immersed in a transformational living-learning experience, networking with gurus from around the world, and engaging in programs led by prominent local and international financial industry experts . It's a holistic experience that will enrich and develop your career - and your life.

ADMISSIONS

We admit candidates to specific sessions on a rolling space available basis, and encourage you to apply as early as possible. Although most programs have no formal educational requirements, admission is a selective process based on your professional achievement and organizational responsibilities.

FOR MORE INFORMATION

https://fa.gov.sa/en?language=en

For A Personalized Consultation

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