Course Synopsis

This 3-day workshop provides participants with the practical knowledge and competencies to carry out private equity investments. Module 2 on Framework for Conducting Private Equity Due Diligence highlights challenges faced when evaluating investments in private companies. Participants will look at due diligence from a PE perspective, and over 3 phases – initial, historical and forward looking. At the end of the 3-day workshop, participants will gain valuable insights from lessons learnt from real-life PE transactions.

Learning Objectives

- Learn the different stages and focuses of due diligence
- Understand the due diligence from a PE perspective
- Evaluate business proposals, synergies and risks
- Determine valuation and walk-away price
- Gain valuable insights from case studies

Who Should Attend

- **Investors, entrepreneurs, high net worth investors** and family offices keen to set up PE funds
- **Financial professionals** such as CEOs, CFOs, accountants, business development managers who engage in PE investments
- **Investment professionals** such as fund managers, analysts, limited partners, endowment trustees, private bankers, looking to deepen their industry knowledge

Program Dates

18 APR to 20 APR

Thu – Sat 09:30 – 17:00

Program Fee

SGD $3,000 (excluding GST)

FICS Funding Criteria

70% FICS funding is available to eligible financial institutions and qualified individuals. Terms and conditions apply.

For Enquiries

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Day 1

Due Diligence – A Private Equity Perspective
- Initial: proposals and teasers
  - Determine matching of fund strategy & investment size
  - Assess regulatory & other barriers
  - Understand business models
- Initial: proposals and teasers
  - Analyse financial strength
  - Evaluate management competency
  - Establish market positioning & competitive advantage
- Forward looking: Pre-Investment
  - Draw up due diligence framework
  - Verify information memorandum
- Valuing potential investees

Day 2

Due Diligence Framework
- What are you buying?
- 4 Cs framework (capability, competition, customer, cost)
- Evaluate synergies, risks and exits
- How to determine walk away price
- Case studies and lessons learned

Day 3

Due Diligence Case Discussion
- Evaluate value proposition of business
- Analyse resources, competitors and financial standing
- Identify growth strategy, expansion plans and synergies
- Assess risks and exit opportunities
- Determine valuation and walk away price

Trainer’s Biography

Yong Kwek Ping is the CEO of Inventis Investment Holdings (China) Co Ltd, a leading private equity firm based in China with more than USD4.2bn of capital under management. Yong is responsible for the investment strategy and performance of the funds for the greater China region; his investment interest lies across industries such as education, retail, financial services, logistics and contract manufacturing industries. Yong is an engineer by training and a Senior Fellow of the Wharton School, University of Pennsylvania, USA. He is frequently invited to speak at major investment and business conferences globally.

About FTI

Since its inception in 2007, the Financial Training Institute@SMU (FTI) has established a solid reputation for quality training programs and setting high certification standards for executives and professionals in the financial services industry.

FTI has trained over 2,300 participants and certified about 600 professionals from more than 100 financial institutions, an endorsement of the strong support from the financial services industry. We have since expanded beyond professional certification programs accredited under the Financial Industry Competency Standards, to include specialist workshops in commodity trading and financing.

Looking ahead, FTI will continue to design and develop programs that facilitate progressive expertise-building across functional areas and enhancement in specific fields of expertise.