



**ed-watch**  
Your online resource partner



# Prompt Engineering for Financial Stories, Research, Models, and Reports

*Virtual class*



15<sup>th</sup>, 16<sup>th</sup> & 17<sup>th</sup> September 2025



9:00 AM to 12:30 PM (GMT+3)

## PROGRAM OVERVIEW

In the age of AI, mastering prompt engineering is a game-changer for finance professionals. This course equips participants with the skills to craft effective prompts for generating accurate, insightful, and structured outputs related to financial research, storytelling, modeling, and reporting using large language models (LLMs), including Chatgpt, Gemini, Copilot and Claude.

Through real-world use cases and hands-on practice, participants will learn how to:

- Translate financial questions into precise prompts.
- Generate and validate research and financial commentary.
- Build and debug financial models with AI.
- Create consistent, well-structured financial reports and summaries.

Whether you're in equity research, corporate finance, investment banking, financial reporting, or journalism, this course will help you work faster, think sharper, and communicate better using AI.

## LEARNING OBJECTIVES

By the end of this course, participants will be able to:

- Understand the structure and mechanics of effective prompts.
- Develop AI-generated financial insights, stories, and commentary.
- Co-create Excel-compatible financial models.
- Critically evaluate and refine AI-generated content for financial accuracy.

## TARGET AUDIENCE

- Finance professionals (analysts, associates, managers)
- Equity researchers and financial journalists
- FP&A and corporate strategy teams
- Financial data analysts and consultants
- Business students and CFA/CA aspirants

## COURSE COVERAGE

### Module A: Foundations of Prompt Engineering

- Anatomy of a good prompt
- LLM limitations and risks in finance
- Prompt formats: Zero-shot, few-shot, chain-of-thought
- Tools and Platforms

### Module B: Prompting for Financial Research & Insights

- Writing prompts for market commentary
- Generating SWOT and PESTEL analyses
- Industry and macroeconomic overview generation
- Case study and Exercise

### Module C: Prompting for Financial Models

- Asking AI to build model skeletons
- Debugging Excel formulas via natural language
- Prompt-based walkthroughs of model logic
- Case study and Exercise

### Module D: Prompting for Financial Reporting

- Analyzing financial data and making graphs
- Generating board reports, MD&A sections, and dashboards
- Converting raw data into narrative insights
- Auditing and refining generated content for compliance
- Case study and Exercise

### Module E: Storytelling in Finance with AI

- Structuring investment memos and pitchbooks
- Creating AI-assisted newsletters and earnings summaries
- Using prompts for scenario building and what-if analysis
- Case study and Exercise





## TRAINER PROFILE

### Sana Quadri

IFRS Expert | Financial Storyteller | Process improvement Expert



A dynamic financial leader and digital transformation champion, Ms. Sana Quadri brings over 17 years of experience in finance, process optimization, and innovation. She has played a pivotal role in leading finance functions at renowned institutions, including Easypaisa Digital Bank, Lakson Investments, Next Capital, and HugoBank. Throughout her career, she's tackled diverse projects in the financial services industry, notably in the digital transformation of finance function, internal controls over financial reporting, bookkeeping structure for core banking, corporate governance, and IFRS implementation (16, 9, 15).

Leveraging her deep accounting and finance expertise, Ms. Sana has evolved into a sought-after trainer, empowering others through her knowledge of IFRSs, Financial Reporting & Analysis, and Financial Storytelling. Her "IFRS Practical Issues Series" program provides a platform for accountants to learn and collaborate on real-world challenges.

Ms Sana has delivered impactful training sessions across the Middle East, Africa, South Asia and Europe, tailoring content to regional needs while ensuring alignment with international standards.

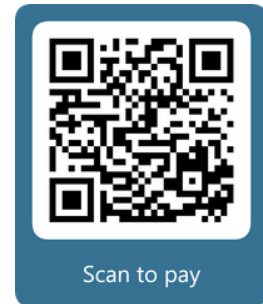
Recognizing the ever-growing need for digital skills, Ms. Sana embraced her entrepreneurial spirit and founded Ed-Watch. This initiative prioritizes equipping individuals and organizations with the skills needed to thrive in the digital age. Her commitment extends beyond the corporate world. As a Chartered Accountant (PwC alumna), Ms. Sana champions inclusivity. She led the development of ICAP's "Women Inclusion Guidelines" and actively participates in committees like "Economic Advisory & Government Relations", "Committee on Fiscal Laws" and "Women's Committee." Her research on "Increasing the tax net in Pakistan" was published in "The Pakistan Accountant" under the title "Time to tackle taxation Jams."



## PROGRAM DETAILS

- 15<sup>th</sup>, 16<sup>th</sup> & 17<sup>th</sup> September 2025.
- 9 credit hours virtual training program.
- 9:00 AM to 12:30 PM (GMT+3)

[PAY NOW](#)



**To proceed with company registration.**

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**For any information, contact us at below given details.**

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## Terms & Conditions

### 1. Registration and Payment Terms

- Course registration with Ed-Watch is only confirmed upon receipt of full payment, which must be completed within seven (7) calendar days from the date the invoice is issued.
- Accepted payment methods include bank transfer, cheque, credit/debit card.
- All course fees displayed in Ed-Watch communications (website, brochures, or proposals) exclude any applicable taxes, duties, or bank transfer-related charges. These additional charges, including any withholding tax, are the responsibility of the client where applicable.

### 2. Cancellation and Refund Policy

- Any cancellation made less than 14 days before the scheduled course start date will be subject to a 100% cancellation fee of the total course fee.
- All cancellation requests must be submitted to Ed-Watch in writing (email or official letter).
- Ed-Watch will acknowledge and respond to any cancellation request within seven (7) days of receipt.



## Nomination Form

| S.No. | Participant Full Name | Job ID | Email ID | Contact No. | Function/ Department | Education Level | Years of Experience |
|-------|-----------------------|--------|----------|-------------|----------------------|-----------------|---------------------|
| 1     |                       |        |          |             |                      |                 |                     |
| 2     |                       |        |          |             |                      |                 |                     |
| 3     |                       |        |          |             |                      |                 |                     |
| 4     |                       |        |          |             |                      |                 |                     |
| 5     |                       |        |          |             |                      |                 |                     |
| 6     |                       |        |          |             |                      |                 |                     |
| 7     |                       |        |          |             |                      |                 |                     |
| 8     |                       |        |          |             |                      |                 |                     |
| 9     |                       |        |          |             |                      |                 |                     |
| 10    |                       |        |          |             |                      |                 |                     |

**Note:** Please complete the details below if your nomination is through a company.

### HR Contact Person Details

|              |           |             |
|--------------|-----------|-------------|
| Name:        | Email ID: | Contact No: |
| Designation: | Company:  |             |

Company Address:

### Invoicing Contact Person Details

|              |             |
|--------------|-------------|
| Name:        | Email ID:   |
| Designation: | Contact No: |

**Any Remarks:**

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