

# Financial Analysis Assignment

*Using your analytical skills in Financial Accounting*

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## One: Pick your companies.

You will be given an opportunity on a first come, first served basis to select two companies in the same industry to analyse. Here is a [list](#) of companies already chosen.

## Two: Conduct a financial analysis.

The scenario is you are to provide financial advice to an investor about which company to invest in. The investing timeline for your client is five years.

READ your teacher's [note](#) on analysis. **Focus carefully on (i) the analysis process and (ii) presenting results.** Use this combined with your own notes and the video lessons to guide you through the analysis and the write up of your discoveries.

## Three: Submit your written analysis summary.

1. Your **written** work (not including graphs tables, stock charts, etc) may not exceed two pages (doesn't include spreadsheet of financial stats).
2. You must put ALL of your work in **THIS FILE** that has been shared with you. DO NOT MAKE YOUR OWN DOCUMENT. To include your financial statistics in the same google doc, insert a link your numbers and ratios which you will locate in a separate google spreadsheet. Don't forget to make sure your teacher can view and edit the spreadsheet with your numbers in it. Delete these instructions out of this file before the due date.
3. Before the due date, review the rubric (and the note on how to prepare an analysis) to make sure you have met all expectations.
4. Do not leave these instructions in your finished work. The rubric below should be at the end.

Failure to read, comprehend, and follow all submission instructions above will result in a loss of communication marks. If you don't know how to do something, then make sure you ask your teacher **well before the due date!**

## Rubric

**\*\*Your knowledge mark for this content will come from the multiple-choice [quiz](#)**

Level 0-1	Level 2	Level 3	Level 4
<p><b>Application</b> More than 4 steps are not done properly or completely, or 3 or more steps were not done</p>	2-4 steps are not accurate, contain omissions, or 2 steps were not done	1-2 steps are not accurate, contain errors of insight, or 1 step was not done or shown	Write up demonstrates student conducted the six steps of analysis as per the note, and all six steps were applied properly
<p><b>Communication</b> Work did not fulfil half or more of the requirements for level 4</p>	Several spelling or grammar errors. Written work generally flowed at a satisfactory level. Some parts required a multiple re-reading or deep concentration on the part of the reader to make any sense of.	Some spelling or grammar errors. Written work generally flowed well. Required a little re-reading to follow. Visual and written structure of paragraphs and paper must be present. Stats must be referenced as you speak to them. Must be written as an argument	Student was able to seamlessly thread opinions and numbers into the argument. Did not seem jumbled or excessive. Flowed well. Must have no spelling or grammar errors. Visual clarity enhanced by use of style and spacing etc. Did not require re-reading to make sense even once.
More than 2 instructions were not followed.	2 were not	1 instruction was not followed	Student work illustrates an ability to read, comprehend, and follow oral and written instructions.
<p><b>Thinking</b> Failure to use 3 or more areas, or used incorrectly or poorly</p>	Failure to use 2 areas or used incorrectly.	Failure to use 1 area or used it incorrectly or very poorly.	<p>Student was able to form and justify a position using:</p> <ul style="list-style-type: none"> <li>● Common sized values</li> <li>● Ratios</li> <li>● Stock/Firm valuation</li> <li>● Qualitative information</li> </ul>
Observations rarely or never are traced to cause(s). Fact vs. hypothesis not clarified, or facts not supported more than 3 times	Numerous observations are not traced to cause(s). Fact vs. hypothesis not clarified, or facts not supported 2-3 times	A few observations are not traced to cause(s). Fact vs. hypothesis not clarified, or facts not supported 1-2 times. Must identify all critical values.	Student has traced important observations (using the statistics) to potential root causes as per the note on the financial analysis process. In so doing, student clearly distinguishes through skilled composition, statements of fact based on financial data, versus personal hypothesis based upon opinion. Facts are supported with data.

No evidence	Some suggestion that it was done such as mentioning it, but almost no evidence shown, or shown but major errors of use, or no real purposeful use.	Clear evidence, though just minimal, or evidence given, but did not add value to analysis to any meaningful degree.	Student's insights showed evidence of extensive research beyond financial data such as stock price data, company and industry issues, etc., and evidence was used effectively to add value to your analysis.
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