**Assignment Guidelines**

* The assignment should consist of the following:
	+ Financial Analysis Sections (Word document – see format guidelines)
		- Company Overview
		- Article Summary
		- Conclusion
	+ Financial Information and Measures (Excel document – see attached)
	+ Yahoo financials (pdf file or printed copies)
	+ Selected article (pdf file or printed copies)
* Format Guidelines – Use this document for your Financial Analysis
	+ Assignment must be typed (Times New Roman 12 font)
	+ Page header on each page – Add your name to this document header
	+ Use a question and answer format
	+ Save the file with the following name: Financial Analysis Project\_Last Name
* Assignment is **due by Sunday, 3/4,** via Canvas.

**Assignment Process**

* Access Yahoo Finance
* Select the company of your choice (Begin typing the company name in the "Get Quotes" tab and select company)
* Print (or save as a pdf) the following sections for the selected company:
	+ "Financials" and select the appropriate financial statements: Income Statement, Balance Sheet, Cash Flow
	+ "Summary"
	+ "Statistics"
	+ “Profile”
	+ “Historical Data

**Company Overview - Gather information about the company.**

1. What is the industry classification for the company?
2. Describe the nature of the company’s business.
3. List the company’s primary products or services (use brand names where available).
4. What were the company’s revenues for the most recent fiscal year?
5. Who is the chairman of the company’s board of directors?
6. Who is the company’s CEO?
7. What is the ticker symbol for the company?
8. What was the price of the company’s stock at the end of one day during this past week?

Price: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. What were the lowest and highest stock prices during the past year?

52-week low: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 52-week high: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Obtain an Article about the Company**

Answer the following questions or complete the assigned task:

1. Name of article: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Source of article (name of magazine or newspaper, date, page numbers):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Summarize the article. Use complete sentences and well-organized paragraphs. Your summary should be no fewer than 100 words in length.

**Conclusion**

Write a summary paragraph explaining what you learned about the company through your analysis. Be sure to address the company’s solvency, profitability, and liquidity.

Would you invest in this company? Why or why not? (Your answer should reflect the results of your analysis.)

**Financial Information and Measures –** Complete this information is the Excel Sheet provided

**Show detail calculations.**

1. Prepare the horizontal and vertical analysis using the most current year and prior year:
* Income Statement
* Balance Sheet
1. Determine the following for the most current year and prior year:

Current Assets Total Stockholders’ Equity

Quick Assets Net Sales (Revenue)

Total Assets Cost of Sales (Revenue)

Current Liabilities Net Income

Long-term Liabilities Paid-in-Capital

1. Obtain the following from Yahoo:

EPS Shares Outstanding

Debt to Equity Ratio Return on Assets Return on Equity

1. Calculate the following (for the most current year) based on the information obtained:
* Working capital
* Current Ratio
* Quick Ratio
* Accounts Receivable Turnover
* Inventory Turnover