UDACITY

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Analyze NYSE Data

REVIEW

HISTORY

Meets Specifications

Congratulations 🌟 ⛳

Hi There,

You have done an amazing job putting together this submission. A Brilliant job is done in the P&L section, the structure of the submission is professional with dynamic functionality. The insights on the Adidas AG are precise and on point .

I have included some comments and would request you to take a look at them. I can only go ahead and talk about how wonderful your submission has been. Your effort and hard work are highly appreciated and it shows in the kind of submission you have put together.

Here is a great article on predictive analytics and how it helps us get insights. You can also refer to this link for an article on methods to help you make great financial statements.

All the best for the upcoming project 😊

Submission Phase

A PDF report or / PPT presentation have been uploaded as part of a zipped folder.

- THIS SECTION MEETS SPECIFICATIONS

Awesome ✅

Thanks for sharing a PDF report in the submission, it looks perfect! The submission depicts great presentation skills.

Suggestion 💡

You can refer to this article for tips on upgrading your PowerPoint skills.

Student provided an Excel file as part of a zipped folder or link to Google Sheet (in case the student used Google Sheets instead of Excel) necessary for review. This file should include their Profit and Loss statement and forecasts. The Google link should be included in the PDF or slides document.

The spreadsheet (Excel or Google Sheets) should contain individual tabs for the dataset, calculation of the summary statistics, dashboard for Profit and Loss statement, and Forecasting model with scenarios. There can be additional tabs in the Workbook that are needed for the dashboard and forecasting model.

 **- THIS SECTION MEETS SPECIFICATIONS**

Awesome ✅

Brilliant job done in sharing the excel file, it looks perfect. Please find below a summary of rubric requirements versus the current submission:

- The submission includes the P&L statement ✅
- The submission includes the Forecasting tab ✅
- The submission contains the Dataset ✅
- The submission contains a Summary statistics tab ✅

Suggestion 💡

It is advisable to have clear formatting in the submission as it helps with easy interpretation of the data. For instance, the metrics of Revenue Growth, Operating Margin, and Gross Margin can be shared as percentages.

Suggestion 💡

You can refer to this link to learn more about excel formatting.

Exploration of Summary Statistics

Student uses the measures of center and spread and at least one numeric summary statistic to generate insights.

Stating the summary statistics is insufficient. Please include in the written description a short insight related to each one.

For example here is an insight based on mean:
The mean total revenue for companies categorized under Pharmaceutical industry ($26,325,440,909.09) was higher compared to mean total revenue for all healthcare industries ($23,142,217,458.76). It looks like companies in the Pharmaceutical industry have a higher total revenue on average than all industries categorized under Health Care.

 - THIS SECTION MEETS SPECIFICATIONS

Awesome ✅

Brilliant job is done using the measures of center and spread. A numeric summary statistic has been used to generate on-point insights, well done.

Suggestion 💡

Please find below an interesting interpretation of Mean

The mean of total revenue for ***IT sector ($ 39.2 billion)*** is higher than the ***Healthcare sector ($ 30.8 billion)***. This states that the companies in the IT sector make a revenue of **US $ 9 billion** more on average than the companies in the Healthcare sector

Suggestion 💡

You can refer to this link to understand how Excel can calculate a summary of the key statistics for a data set.

The student uses standard deviation and range to generate insights.

Stating the standard deviation and range is insufficient. Please include in the written description a short insight related to each one.

For example, please review the finished slide example in the classroom, which can be found in the Analyze NYSE S&P 500 dataset project lesson (Finished Example Slide).

 - THIS SECTION MEETS SPECIFICATIONS

Awesome ✅

The ***standard deviation*** is one of the most common measures for talking about the spread of data. It is used to measure the amount of variability or dispersion around an average. The ***Range*** tells us the distance between the highest value and the lowest value. It also represents the variability of the data. Minor variability is better because it indicates precise measurements and helps in accurate analyses when

compared to major variability. Along those lines, you have included both Standard Deviation and Range in the submission.

Suggestion 💡

Please find below an interesting interpretation of Standard Deviation and Range.

Standard deviation: The standard deviation of total revenue for the IT sector ($ 56.7 billion) is higher than the standard deviation of the total revenue of the Healthcare sector ($ 38 billion) which means that the IT sector has less stable revenues as they change on average more than the average change (Standard Deviation) of the healthcare sector. Hence it can be concluded that Investing in IT sector companies is much riskier than investing in the Healthcare sector

Range: The Range of Total Revenue for the IT sector Total Revenue at $ 232 billion is higher compared with The Range of Total Revenue for the Healthcare sector at $ 114.5 billion. We can infer that the variability in Total Revenue for companies in the IT sector is greater as the range is more spread out versus the Healthcare sector.

Suggestion 💡

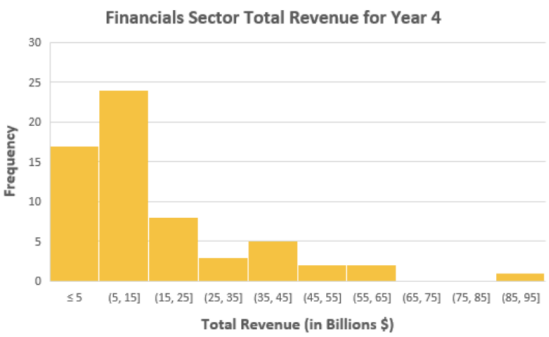
You can refer to this link and this link to understand the importance of calculating Standard Deviation and Range.

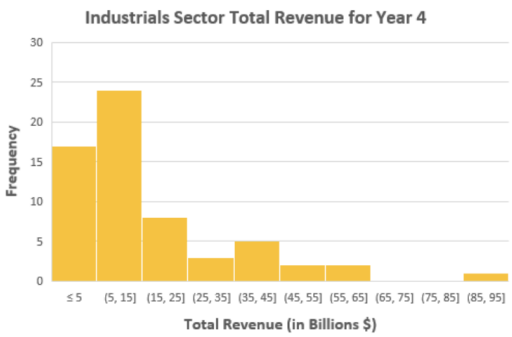
The student uses at least one plot to explore the data. The plots may include histograms, box plots, scatterplots, and bar charts to explore data and gain insights.
All slides must contain a visualization. Screenshots of values in a table do not count.

- THIS SECTION MEETS SPECIFICATIONS

Awesome ✅

Great Job is done in this section. The shared **histogram** is on point and helps us understand the data better. Please note that graphs and charts condense large amounts of information into easy-to-understand formats that clearly and effectively communicate important points.





Suggestion 💡

You can refer to this link for an article on choosing the right chart for your data.

An appropriate visual is chosen to present the data. All labels are legible and the visual has appropriate axis labels.

Every visualization should have

- chart title (including which year's data the chart depicts)
- x axis title
- x axis labels
- y axis title
- y axis labels

Please refer to the finished slide example page in the classroom for an example.

- THIS SECTION MEETS SPECIFICATIONS

Awesome ✅

Brilliant job is done in this section. Axis titles are important as they distinctly state the data that has been plotted on each axis. Labels showcase the relationship between the axes and the data plots. Please find below a summary of the current submission versus the rubric requirement.

- chart title (including which year's data the chart depicts) ✅
- x-axis title ✅
- x-axis labels ✅
- y-axis title ✅
- y-axis labels ✅

Communication Phase

The results of the analysis are presented such that any limitations are clear. The analysis does not state or imply that one change causes another based solely on a correlation.

The results do not imply facts about a larger group of individuals based on descriptive values. Language is only applied to the specific data provided unless a correct analysis beyond the course material is conducted that allows for inference.

- THIS SECTION MEETS SPECIFICATIONS

Awesome ✅

Excellent!

- No causal statements have been made.
- The reported insights are only based on the performed Data analysis.

Suggestion 💡

Here you can find a good article on the difference between correlation and causation.

The analysis associated with answering a particular question uses the appropriate variables, summary statistics, and plots that could provide an answer.

- THIS SECTION MEETS SPECIFICATIONS

Awesome ✅

Nice work!

- Your interpretations of The Summary Statistics are correct. And you've also used the correct charts to present your Data.

Business Metrics

Student has input the correct formula for each business metric in the income statement and forecast model. Student has built a forecast model for any company of choice. A dropdown for a company in the forecast model is NOT required.

- THIS SECTION MEETS SPECIFICATIONS

Awesome ✅

A job is well done!

All the formulas you used in the excel workbook are correct. I like the idea of how you used INDEX & MATCH and OFFSET & MATCH functions to complete your P & L statement and Forecast. The dynamic company drop-down included in the P&L statement works well.

The student provides appropriate assumptions based on gross margin, revenue growth, and operating margin for the financial model scenarios.

- THIS SECTION MEETS SPECIFICATIONS

Awesome ✅

Great Job!

- All of the assumptions are relevant to Adidas AG historical Data.
- This is a challenging requirement but you've made it through!

Suggestion 💡

To make the assumptions fit for every company in the data-set, you can use The Standard Deviation.
STRONG CASE = AVG(ARRAY_X) + STDEV(ARRAY_X)

BASE CASE = AVG(ARRAY_X)

WEAK CASE = AVG(ARRAY_X) - STDEV(ARRAY_X)

Why?
Because The Standard Deviation measures how far each data point is away from the mean value on average. And then we add that change on average or subtract it based on the case.

By using the above technique, you'll be able to change the company name from the Ticker Symbol Drop-Down List and still, get accurate assumptions without worrying about the fixed values in The Strong & Weak cases.

Application

Excel Functions and Modeling

Student demonstrates using VLOOKUP or INDEX and MATCH statements. The student can use the appropriate functions such as OFFSET and MATCH to create forecast scenarios.

Awesome ✅

Well done in this section. The submission depicts a clear understanding of the excel functions. You have You have used **INDEX & MATCH** and **OFFSET & MATCH** functions for creating income statements and forecasting respectively.

Suggestion 💡

You may refer to following resources to further understand the usage of Excel functions in creating Forecast scenarios:

- OFFSET MATCH and Data Validation Excel Model Template
- Financial Modelling Techniques - INDEX & MATCH

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