TDI EXCEL CAPSTONE PROJECT BRIEF

Subject: Capstone Project – ESG & Financial Performance Analysis

Welcome Message

Dear Data Analyst,

Congratulations! You have been hired as a Data Analyst for The Data Immersed (TDI). TDI is delving into ESG (Environmental, Social, and Governance) metrics and their impact on company performance across various industries and regions. Your role is to design an **ESG-Financial Performance Dashboard** to identify trends, analyze risks, and support decision-making for sustainable investment strategies.

Project Objectives

Problem Statement Definition

Clearly define how ESG factors relate to company financials. This includes:

- Identifying high- and low-performing companies from an ESG perspective.

- Investigating which ESG pillars (Environmental, Social, Governance) most strongly correlate with financial success.

- Recognizing industry or regional patterns in ESG scores and performance metrics.

Data Cleaning and Transformation

Prepare the dataset for analysis by:

- Combining and cleaning the data.

- Handling missing values.

- Standardizing data formats.

- Creating calculated columns.

Data Analysis

You are required to formulate **five** original business questions grounded in data analytics. These questions should aim to uncover trends, outliers, or predictive insights that support strategic decision-making.

Dashboard Development

Build an interactive **ESG-Financial Analysis Dashboard** in Excel, featuring:

- Filters,

- KPIs, and

- Visual elements.

ESG Patterns and Investment Insights

Use the analysis to:

- Detect issues with performance.

- Highlight growth potential.

- Provide recommendations for investors or internal stakeholders.

Policy & Strategy Recommendations

Translate insights into actionable strategies, including:

- Suggested focus areas for ESG improvements.

- Strategic investments in companies with rising ESG trends.

Project Deliverables

1. **Problem Statement Document**
   A concise document outlining ESG and financial performance challenges and questions this project aims to address.

2. **Excel Workbook** (.xlsx)

   - Cleaned and processed dataset.

   - Analysis sheets with charts, pivots, KPIs.

   - Interactive dashboard for ESG and financial exploration.

3. **Key Insights & Recommendations Report**
   PowerPoint summary of ESG-financial patterns and strategic advice.

4. **Documentation**
   Report explaining project scope, cleaning steps, formulas, and dashboard features.

Project Timeline

You have **10 days** to complete this project (Submission deadline: **Thursday, April 24, at 3PM**). Use your time wisely, and don't hesitate to ask for help!

Best regards,
TDI Projects Team