UDACITY

‹ Return to "Business Analytics Nanodegree" in the classroom

Analyze NYSE Data

REVIEW

ANNOTATIONS 1

HISTORY

Meets Specifications

Dear Student,
Congratulations for a perfect project 🎉 You have done an outstanding job building financial statements and forecasts with complex Excel functions and business metric formulas. Your reporting and data visualization work is professional and above average. 👏
Good luck in the rest of your learning journey with Udacity!

Submission Phase

A PDF report have been uploaded as part of a zipped folder.

✅Perfect submission. Everything was submitted and in the correct format.

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.

🌟🎉Your spreadsheet was very neatly organized, had all the necessary sheets and tabs.

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.

✅Complete and relevant analysis of the median to gage the industries' average level of revenue. Perfect analysis.

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).

✅✅ You went above requirements calculating the Min and Max as references of spread. Awesome!
✅ You have calculated the standard deviation as a direct indicator of variability. Perfect!
✅ Good work calculating the range. **Suggestion** Try to check if the ranges in the GETPIVOTDATA function are correct. I got #REF errors, but I did not count them because I they are usually the result of copying a function from different worksheet where these ranges were created.

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 does not count.

✅As I mentioned in my first review, your chart is perfect to depict your finding.
💡Try to add an edge to your report by depicting other interesting things like outliers, or how evenly distributed

is revenue in each sector. Here are some awesome articles that will teach you how to draw different charts for a rich presentation:
. How to Build A Histogram in Excel
. Interpreting Skewed Data and Histograms

. Box and Whisker Plots in Excel
. How to Choose Excel Charts 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.

✅Excellent work here!

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.

✅Your conclusions are correct, accurate and pretty useful from an investor's perspective. Good job!

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

✅Excellent use of key statistics to pinpoint the levels of revenue in each industry with a disclosure of volatility and variability as indicated by the range and standard deviation.

Business Metrics

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.

🌟👏Top notch work with financial metrics concepts and financial modeling using sensitivity analysis.

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

✅Your assumptions are realistic with respect to the historical data. Nice job!

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.

🌟Excellent use of lookup functions like OFFSET and INDEX MATCH.

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RETURN TO PATH

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