

# Analyzing Forbes Global 2000 and Fortune Global 500



**FORTUNE**  
GLOBAL  
**500**

# Disclaimer

Sector (Forbes) ▲	sector (Fortune)
Consumer Discretionary	Apparel
Consumer Discretionary	Business Services
Consumer Discretionary	Conglomerate
Consumer Discretionary	Diversified Industry
Consumer Discretionary	Hotels, Restaurants & Leisure
Consumer Discretionary	Media
Consumer Discretionary	Motor Vehicles & Parts
Consumer Discretionary	Retailing
Consumer Discretionary	Trading
Consumer Discretionary	Wholesalers
Consumer Staples	Consumer Staples
Consumer Staples	Food & Drug Stores
Consumer Staples	Food, Beverages & Tobacco
Consumer Staples	Household Products
Energy	Energy
Financials	Financials
Financials	Real Estate
Health Care	Health Care
Industrials	Aerospace & Defense
Industrials	Engineering & Construction
Industrials	Industrials
Industrials	Security
Industrials	Transportation
Information Technology	Technology
Materials	Chemicals
Materials	Materials
Telecommunication Services	Telecommunications

- i. Map out sector in Fortune to be in synch with Forbes. Forbes' sector follows the standard market sector categorization, Global Industry Classification Standard
- ii. Use 80/20 Rule in selecting list of companies to analyze - by Market value and Revenue. Proliferate to Fortune and chose Top 200 companies to analyze. (Tab Forbes & Fortune)
- iii) Year selected from 2008 (Tech bubble) to 2020
- iv) Fortune - exclude the effect of Covid. Report published during Mar time
- v) Forbes - include initial Covid. Report was published July/Aug time

# Data Wrangling

**i.** Remove rows > 200 for both Forbes and Fortune data

**ii.** Add column 'Year' for both Forbes and Fortune and convert data to Date

**iii.** Forbes 2020 table - split 'B' and '\$' - **Add Column -> Column by Examples**

**iv.** Merge all years (2008 to 2020) into 1 table - **Append Queries**

**v.** Change all units to Billions in Fortune - **Add Column-> Add Formula (Data /1000)**

**vi.** Format All Currency Fields to 'Fixed Decimal' **Home->Data Type**

**vii.** Add Column 'Sector (Forbes)' to Fortune table and map Fortune sector to Forbes sector - **Add Column -> Add Conditional Column**

**viii.** Sector X-Ref table - Use first row as Headers

## i.Remove Bottom Rows

Remove Bottom Rows

Specify how many rows to remove from the bottom.

Number of rows

1800

## ii. Add Column 'Year'

Custom Column

Add a column that is computed from the other columns.

New column name

Year

Custom column formula ⓘ

= [[Year]]

## iii. Add Column -> Column From Examples

File Home Transform Add Column

Column From Examples Custom Column Invoke Custom Function

Conditional Column Index Column Duplicate Column

General

## iv. Append Queries

Append

Concatenate rows from three or more tables into a single table.

Two tables Three or more tables

Available tables

Forbes (Current)

2009

2010

2011

2012

2013

2014

2015

2016

2017

Tables to append

Forbes (Current)

2009

2010

2011

2012

2013

2014

2015

2016

2017

Add >>

## v. Add Custom Column with Formula

Custom Column

Add a column that is computed from the other columns.

New column name

Revenues.1

Custom column formula ⓘ

= [[Revenues]]/1000

## vii. Add Conditional Column

Add Conditional Column

Add a conditional column that is computed from the other columns or values.

New column name

Custom

	Column Name	Operator	Value ⓘ		Output ⓘ
If	sector	equals	ABC 123	Then	Apparel
Else If	sector	equals	ABC 123	Then	Business Services
Else If	sector	equals	ABC 123	Then	Conglomerate
Else If	sector	equals	ABC 123	Then	Diversified Industry

## viii. Use First row as Header

Use First Row as Headers

Promote the first row of data in the table to column headers.

Types

Promote all scalar types



# Forbes (Top 200)

Select all

Consumer Discreti...

Consumer Staples

Energy

Financials

Health Care

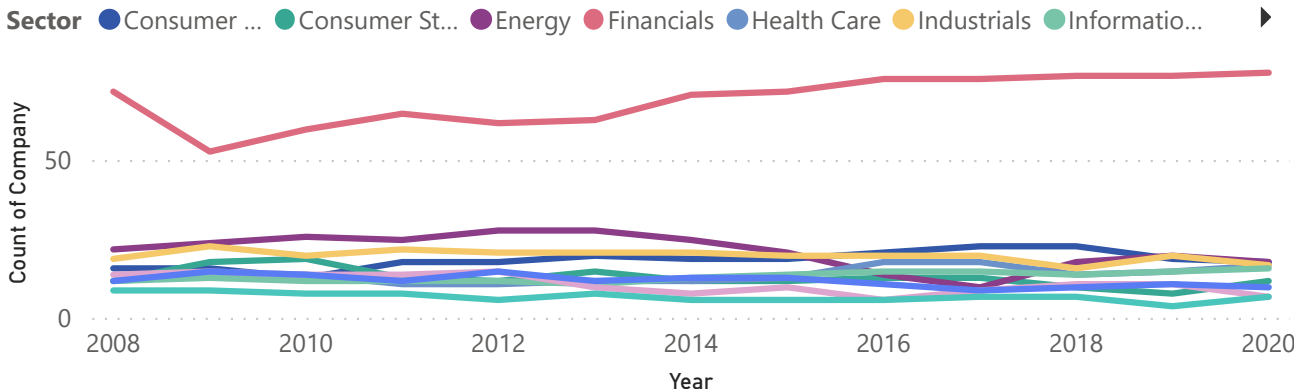
Industrials

Information Techn...

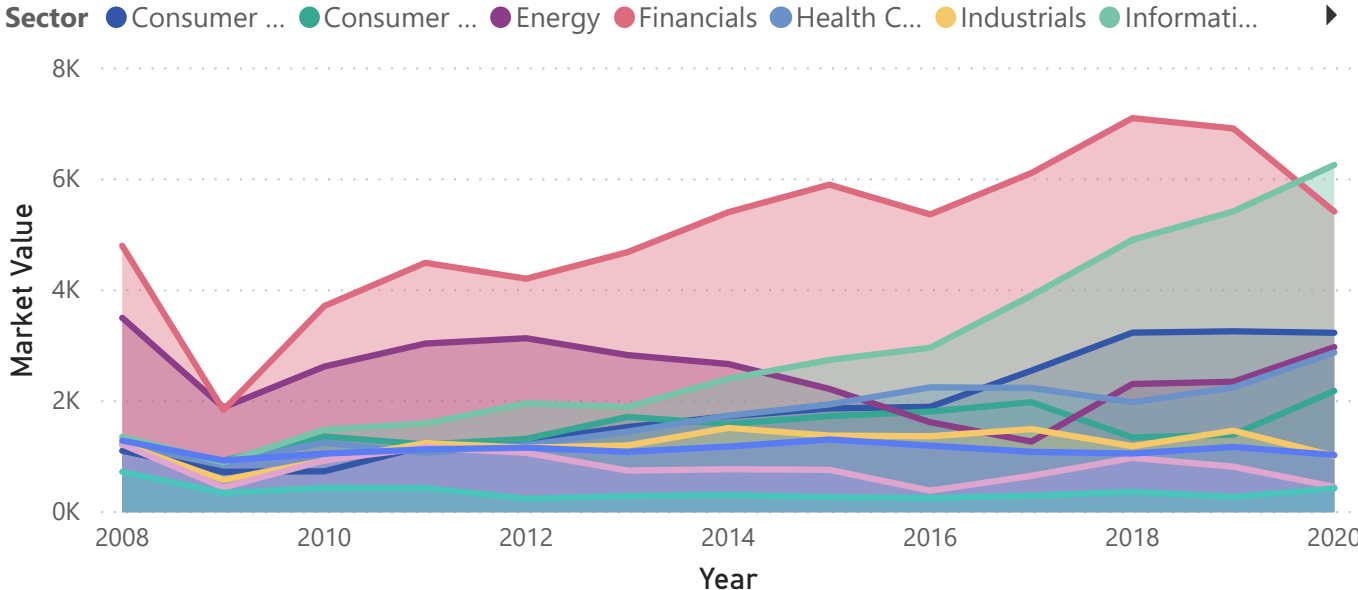
Materials



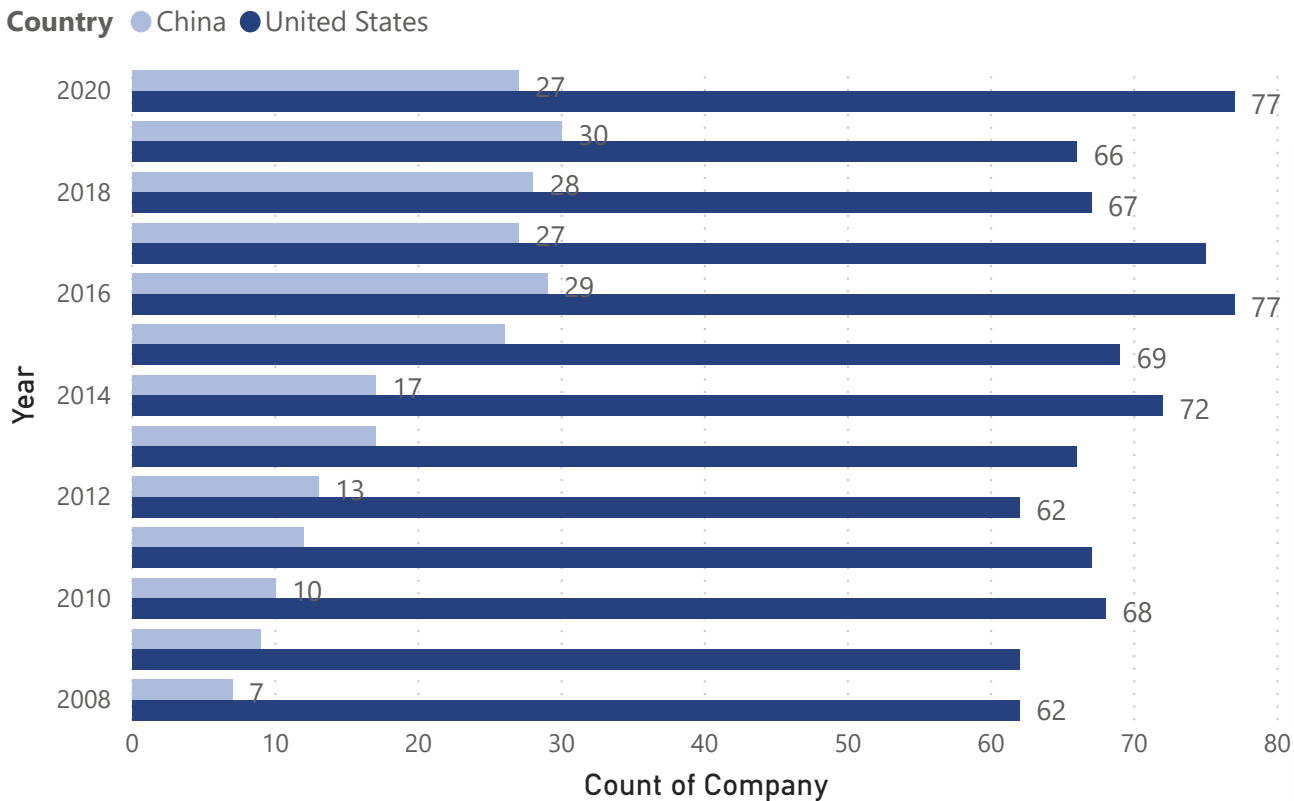
### Evolution of Sectors



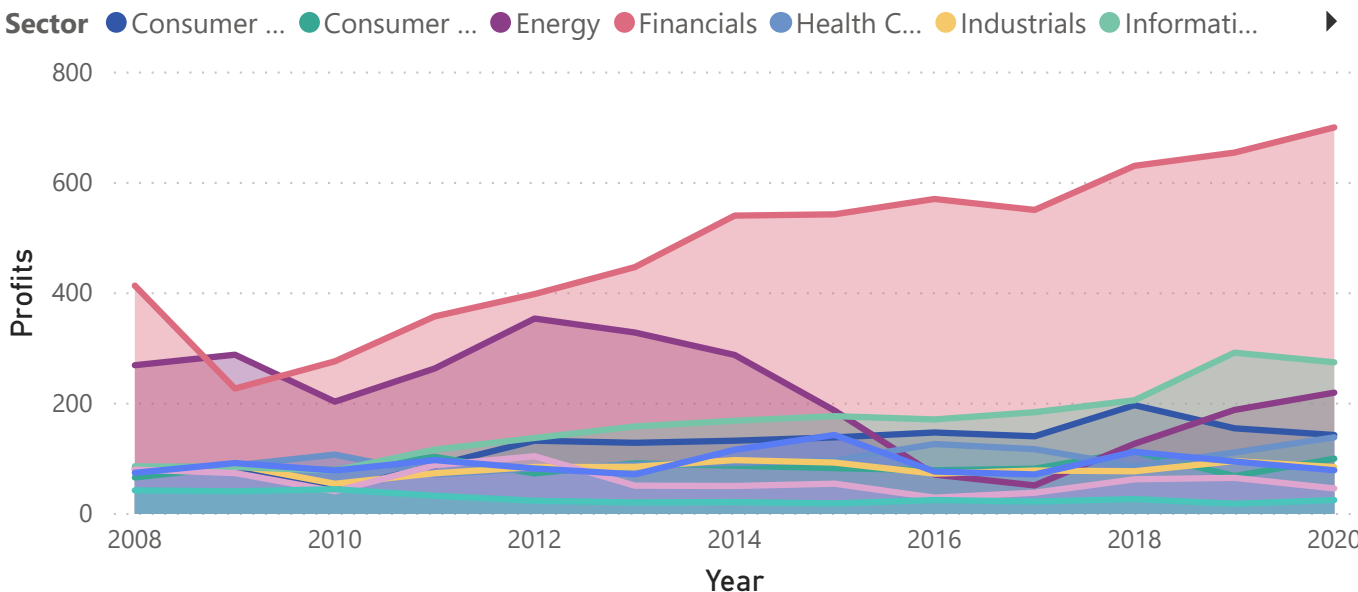
### Market Value by Year and Sector



### US/China Stack up Over Time



### Profits by Year and Sector





# Fortune (Top 200)

Select all

Consumer Discreti...

Consumer Staples

Energy

Financials

Health Care

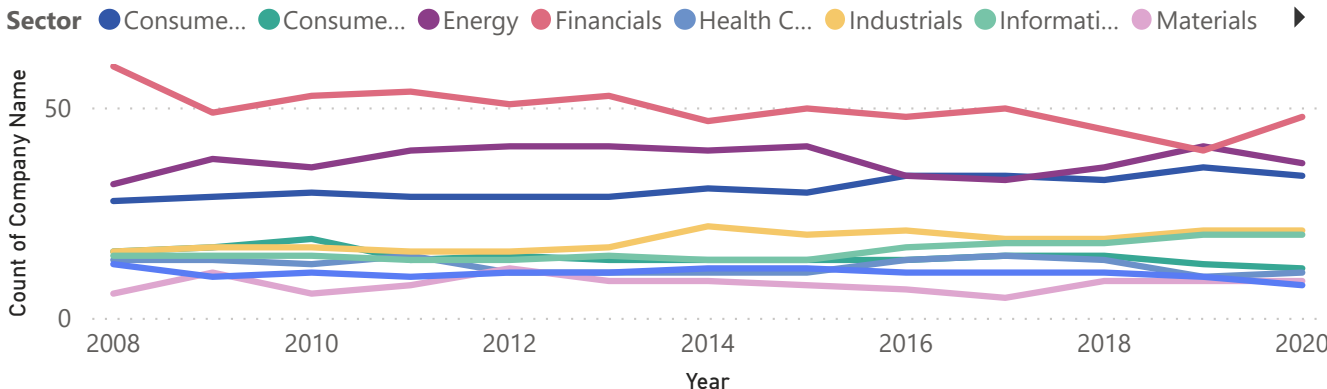
Industrials

Information Techn...

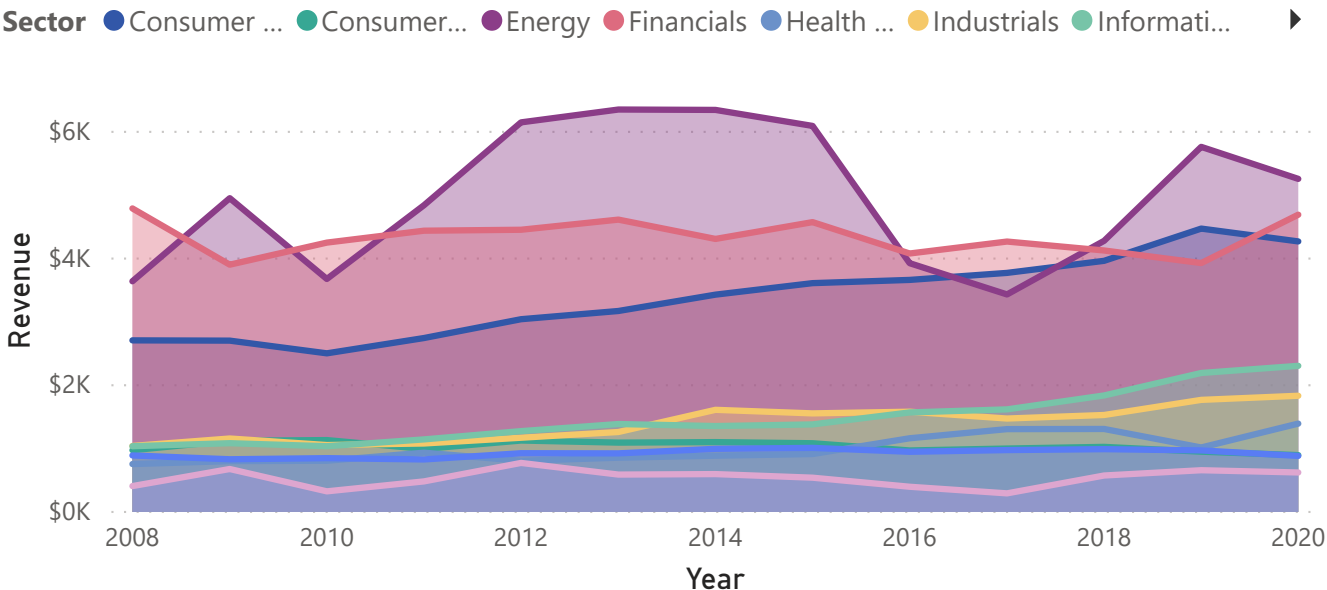
Materials



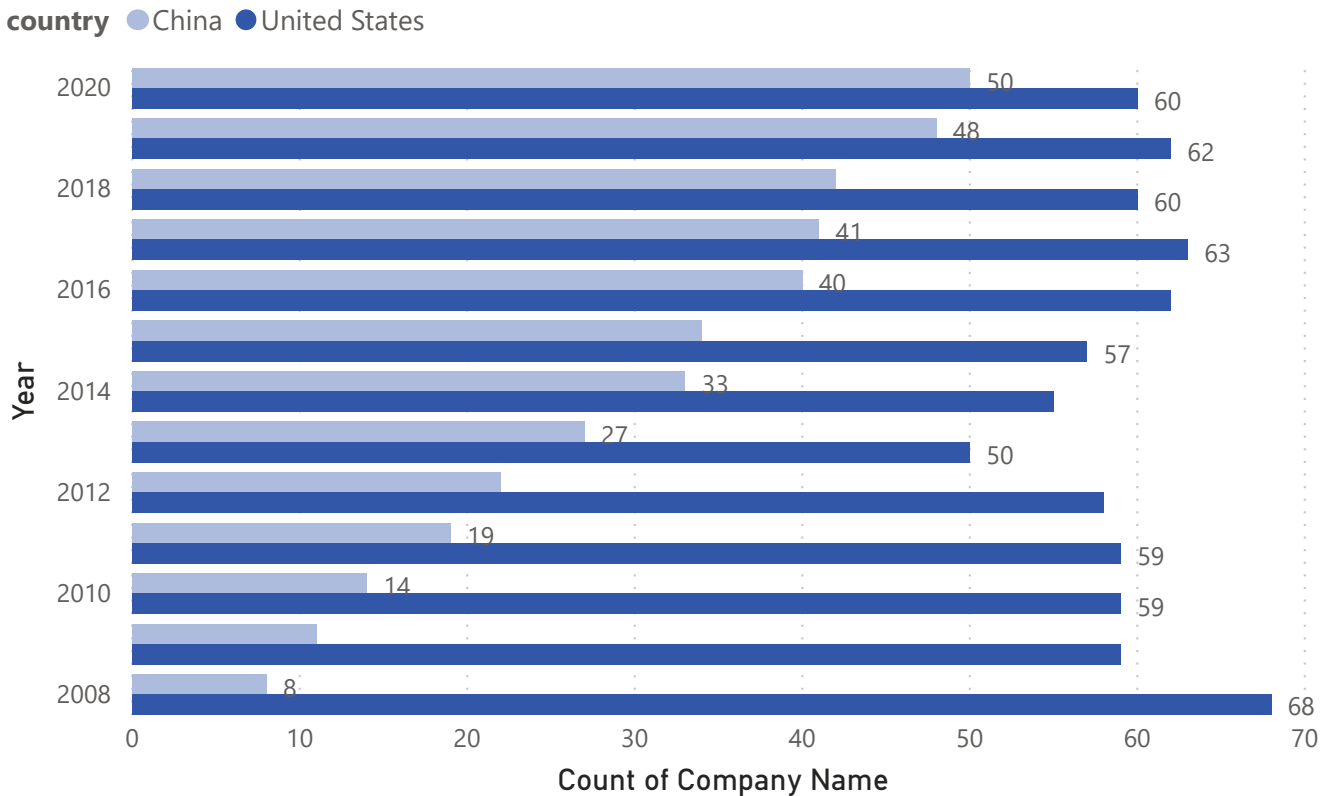
### Evolution of Sectors



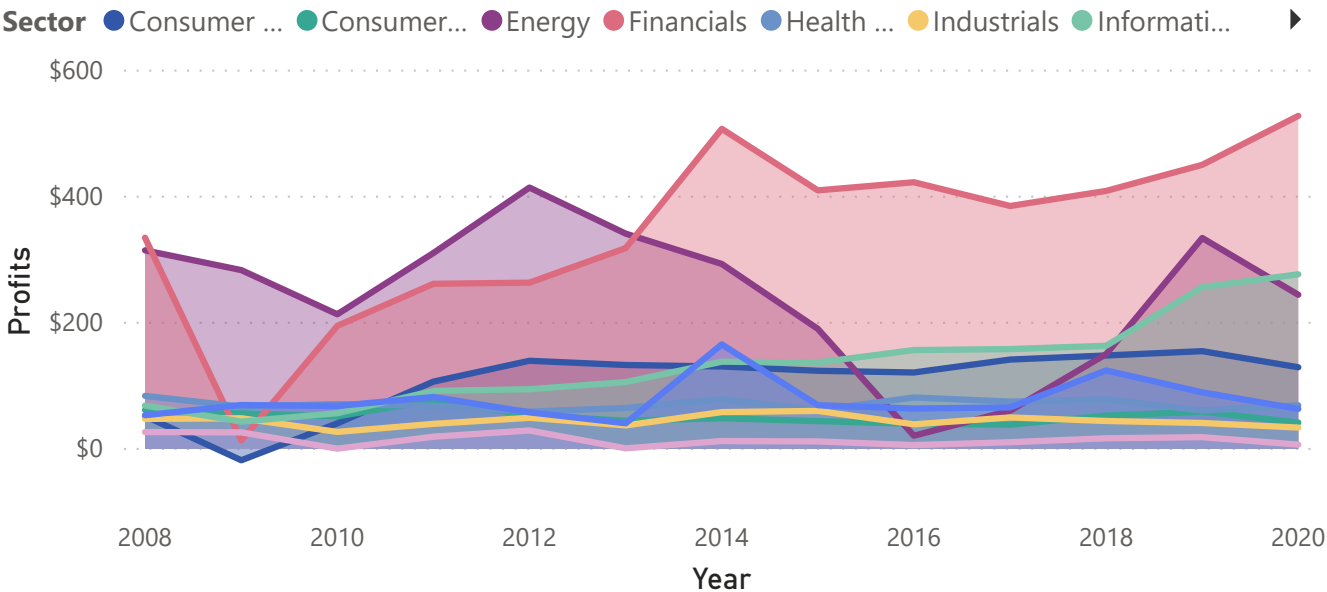
### Revenue by Year and Sector



### US/China Stack up Overtime



### Profits by Year and Sector



# Forbes & Fortune Year 2020

Select all

Consumer Discr...

Consumer Stapl...

Energy

Financials

Health Care

Industrials

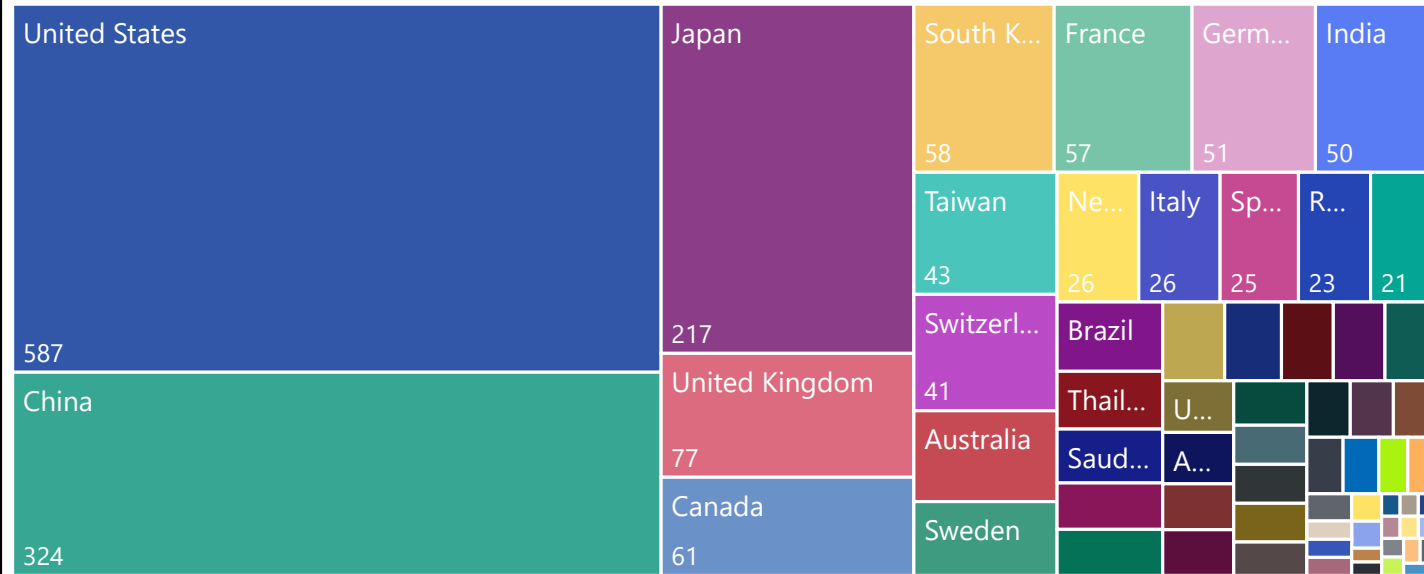
Information Tec...

Materials

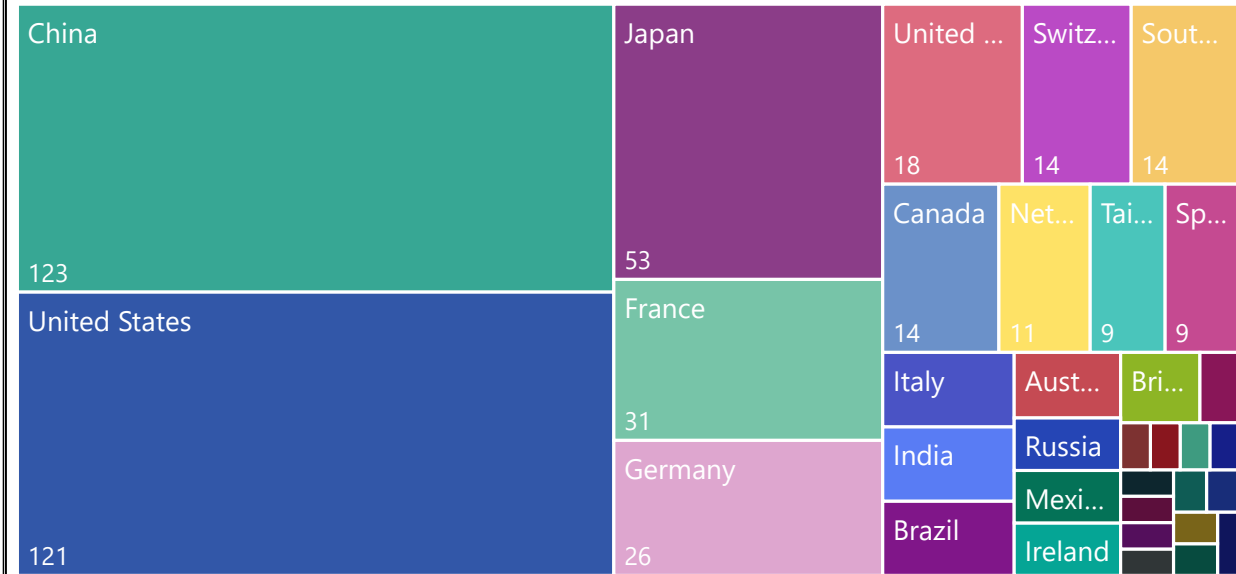
Telecommunica...



## Forbes - Location of Companies

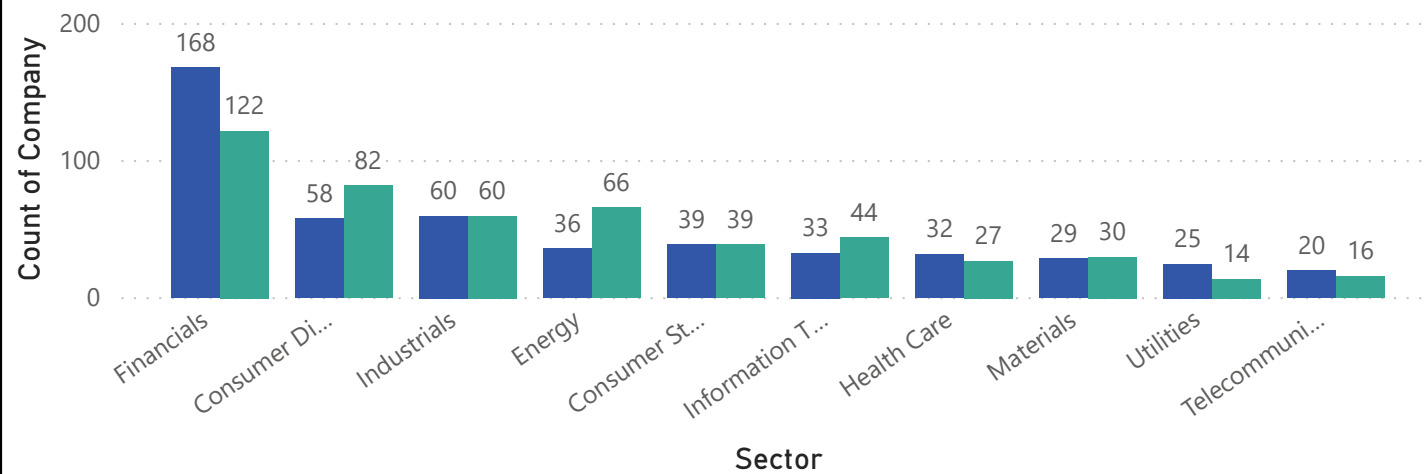


## Fortune - Location of Companies



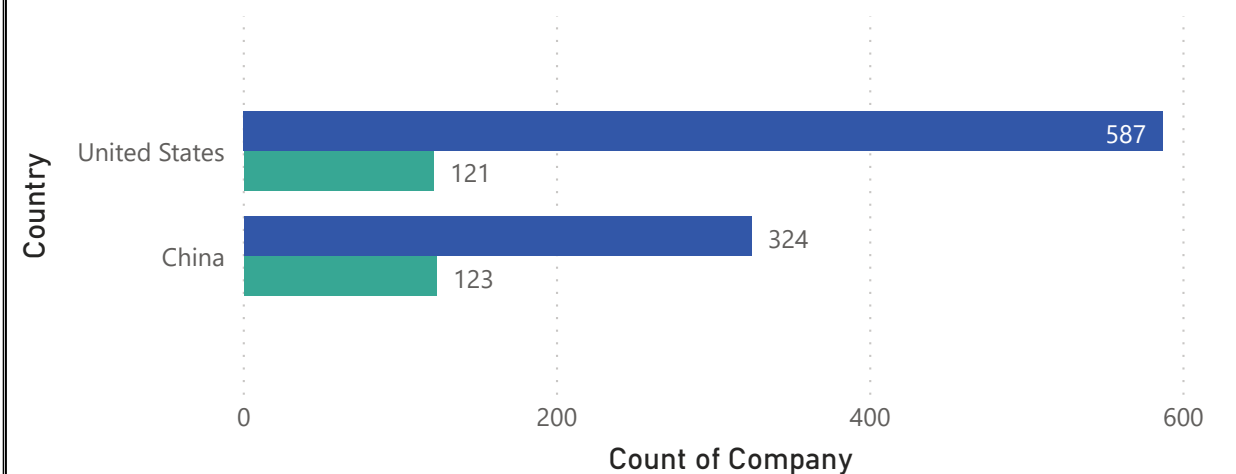
## Number of Companies By Sector

Magazine ● Forbes ● Fortune



## US/China Stack Up

Magazine ● Forbes ● Fortune



Disclaimer - '[Location of Companies](#)' and '[US/China Stack Up](#)' use full data set for Year 2020 - Forbes 2000 companies and Fortune 500 companies.  
'[Number of Companies By Sector](#)' use 500 companies for both Forbes and Fortune

# Analyzing Profits in Forbes and Fortune

Forbes Top 500

Company	Rank	Revenue	Profits	Profits by Rev
ICBC	1	\$177.2	\$45.3	25.56%
China Construction Bank	2	\$162.1	\$38.9	24.00%
JPMorgan Chase	3	\$142.9	\$30	20.99%
Berkshire Hathaway	4	\$254.6	\$81.4	31.97%
Agricultural Bank of China	5	\$148.7	\$30.9	20.78%
Saudi Arabian Oil Company (Saudi Aramco)	6	\$329.8	\$88.2	26.74%
Ping An Insurance Group	7	\$155	\$18.8	12.13%
Bank of America	8	\$112.1	\$24.1	21.50%
Apple	9	\$267.7	\$57.2	21.37%
Bank of China	10	\$135.4	\$27.2	20.09%
AT&T	11	\$179.2	\$14.4	8.04%
Toyota Motor	12	\$280.5	\$22.7	8.09%
Alphabet	13	\$166.3	\$34.5	20.75%
ExxonMobil	14	\$256	\$14.3	5.59%
Microsoft	15	\$138.6	\$46.3	33.41%
Total		\$26,965.1	\$13,423	49.78%

Forbes - Count of  
Negative Profits

8

Fortune 500

Company	Rank	Revenue	Profits	Profits by Rev
Walmart	1	\$523.964	\$14.881	2.84%
Sinopec Group	2	\$407.009	\$6.7932	1.67%
State Grid	3	\$383.906	\$7.97	2.08%
China National Petroleum	4	\$379.13	\$4.4432	1.17%
Royal Dutch Shell	5	\$352.106	\$15.842	4.50%
Saudi Aramco	6	\$329.784	\$88.2109	26.75%
Volkswagen	7	\$282.76	\$15.542	5.50%
BP	8	\$282.616	\$4.026	1.42%
Amazon.com	9	\$280.522	\$11.588	4.13%
Toyota Motor	10	\$275.288	\$19.0962	6.94%
Exxon Mobil	11	\$264.938	\$14.34	5.41%
Apple	12	\$260.174	\$55.256	21.24%
CVS Health	13	\$256.776	\$6.634	2.58%
Berkshire Hathaway	14	\$254.616	\$81.417	31.98%
UnitedHealth Group	15	\$242.155	\$13.839	5.71%
Total		\$33,294.16	\$2,061.3167	6.19%

Fortune - Count of  
Negative Profits

45

'Red Circle with X' - < 0 (Negative) , 'Yellow Triangle' - >0<10% , 'Green Circle' - >10<30 , 'Purple Circle' - >30% <100% , 'Black Star' - > 100%



# Market Capitalization

Select all

Consumer Discretion...

Consumer Staples

Energy

Financials

Health Care

Information Technol...

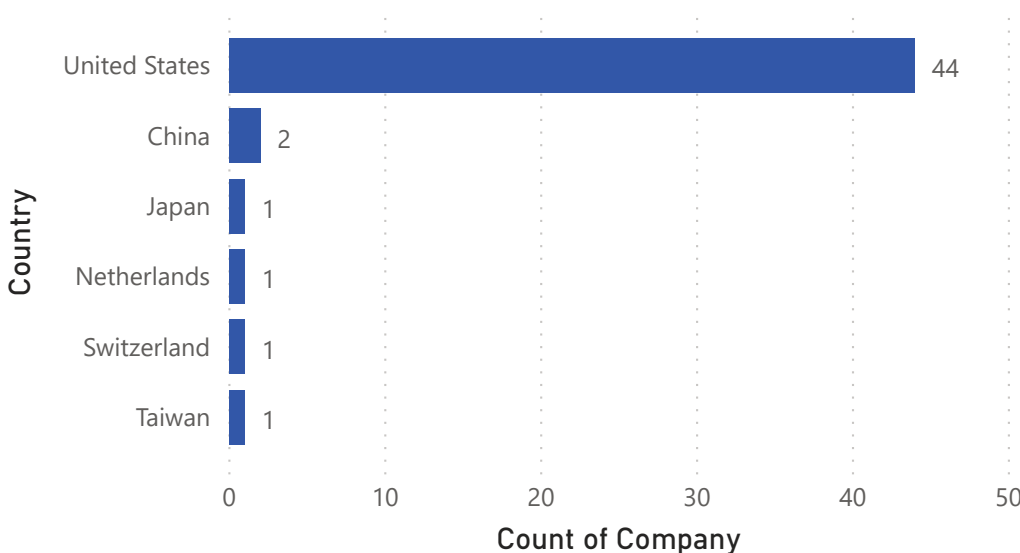
Telecommunication ...

## Top 50 By Market Capitalization as of 31 Dec 2020 (Dogs of the Dow)

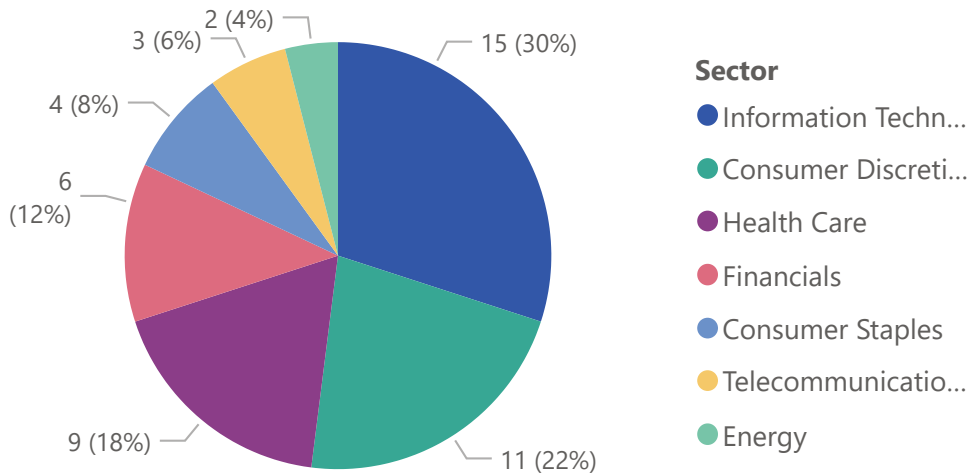
Company	Symbol	Sector	Rank	Market Cap	1d Chg	1m Chg	12m Chg
Apple	AAPL	Information Technology	1	\$2,269	-0.80%	11.50%	81%
Microsoft	MSFT	Information Technology	2	\$1,681.6	0.30%	3.90%	41%
Amazon	AMZN	Consumer Discretionary	3	\$1,634.2	-0.90%	2.80%	76%
Alphabet	GOOGL	Information Technology	4	\$1,185.3	0.90%	-0.10%	31%
Facebook	FB	Information Technology	5	\$778	0.50%	-1.40%	33%
Tesla	TSLA	Consumer Discretionary	6	\$668.9	-1.90%	3.90%	558%
Alibaba	BABA	Consumer Staples	7	\$629.7	-2.40%	-11.60%	10%
Taiwan Semiconductor	TSM	Information Technology	8	\$565.5	0.10%	12.40%	88%
Berkshire Hathaway	BRK.A	Financials	9	\$543.7	0.80%	1.20%	2%
Johnson & Johnson	JNJ	Health Care	10	\$414.3	0.90%	8.80%	8%
Walmart	WMT	Consumer Discretionary	11	\$407.8	0.00%	-5.70%	21%
JPMorgan Chase	JPM	Financials	12	\$387.3	1.40%	7.80%	-9%
Visa	V	Financials	13	\$370.9	0.20%	4.00%	16%
Mastercard	MA	Financials	14	\$355.8	0.40%	6.10%	20%
Procter & Gamble	PG	Consumer Staples	15	\$343.6	1.00%	0.20%	11%
UnitedHealth	UNH	Health Care	16	\$332.7	1.60%	4.30%	19%
Disney	DIS	Consumer Discretionary	17	\$328	0.00%	22.40%	25%
NVIDIA	NVDA	Information Technology	18	\$323.2	-0.70%	-2.60%	122%

**Red Arrow (downward)** - < 0 (Negative), **Yellow Triangle** - >0 < 30%,  
**Green Circle** - >30% <100%, **Black Star** - > 100%

## Location of Companies by Country



## Companies by Sector





# Recommendation And Solution

## Recommendations

Forbes, Fortune and Global Finance are metric driven. For a company to be listed, they need to meet the metrics set by them.

Forbes metric - A composite score for 4 metrics **Sales, Market Value, Profits and Assets**

Fortune - Measures only 1 metric **Revenue**

Global Finance - Measures by **Market Capitalization**

To be listed, a company will need to meet the metrics

## Solution

Companies need to build a **successful business** (Business Checklist, 2019). Fundamentals of a successful business are -

- Financially stable to weather bad times
- Vision - has aspirations and directions
- Need great people

Taking the top performers in Market Cap, factors to make a successful Company are -

- Customer Experience
- Early Mover Advantage
- Innovation
- Leadership
- Technology
- Branding

## Success Factor

Company	Factors to be Successful	Success Factors
Amazon	Relentless customer focus and innovation	Customer Experience
Apple	Customer Experience and Retail Experience	Customer Experience
Apple	Quality Products	Customer Experience
Tesla	It simplifies the buying process, putting the consumer in control	Customer Experience
Amazon	Early mover advantage	Early Mover Advantage
Apple	Ahead of the Curve	Early Mover Advantage
Apple	Apple stays at least two years ahead of its competitors	Early Mover Advantage
Tesla	It attaches itself to the predominant market trend of the day — going green to reduce global warming.	Early Mover Advantage
Amazon	A complete ecosystem that gives an unmatched product proposition	Innovation
Amazon	Agility and hunger to succeed even at its massive scale	Innovation
Apple	Range of Products	Innovation
Tesla	It develops cars as it would a software product.	Innovation
Tesla	It leverages its prowess in battery technology to minimize the total cost of ownership over the vehicle's lifetime.	Innovation
Apple	Improvements and Steve Jobs Brand	Innovation and Branding
Amazon	Jeff Bezos' leadership	Leadership
Apple	Dynamic Business Plan	Leadership
Amazon	Big data	Technology

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