



## Equity Research Initiative

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### Phase 1: Introduction to Finance and MS Excel

#### **Objective:**

- \* To get introduced to the world of finance. To understand the basics of the commonly used terminology in finance and accounting.
- \* To get introduced to Microsoft Excel and some of its functionality, which is useful for Ratio Analysis and Valuation.

#### **Assignment and Guidelines:**

- Download the Video Lectures and the ERI Guidebook. Go through them meticulously.
- From the ERI Guidebook, please refer to the following sections: *Investment Research and Equity Research Initiative, What is a Company?, Broad Approach of Analyzing Share Price Movement, Understanding Financial Statements (Pages 3 - 33).*
- **Download the Unsolved Excel Workbook that has been shared. Attempt to solve the Workbook on your own, to familiarize yourself with the tools covered.**
- **Download the Solved Excel Workbook that has been shared to check the accuracy of your attempt.**
- To expand your knowledge, please refer to the Optional Resource Material provided. This is not compulsory.