

Meets Specifications

Excellent project, you have a good understanding of using the correct formulas and assumptions to create a great financial model where required and creating good slides supported by visualisations with clear descriptions to explain the analysis using the measures of centre and spread to support the claims.

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.

A job well done! All the formulas you used in the excel workbook are correct.

✓ **Task 2** and **3** contains the **business metrics for years 1 - 4**

✓ **Task 2** contains an **interactive drop-down to select a company** and bring through their historical data

✓ **Task 3** contains the **operating statistics and business metrics** for years 1 - 4 for your chosen company.

✓ **Task 3** contains the **operating statistics, assumptions and forecasting for years 5 and 6.**

✓ **Task 3** contains an **interactive drop-down to select a different scenario case** to forecast the financials.

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

Excellent work here! Not many students understand how to make **proper assumptions**, but your assumptions in the forecast are on the mark. That shows your grip on the subject. Also, the forecast values change based on your assumptions - good work there!

✓ Year 5 and 6 assumptions are provided for the **Revenue Growth, Gross and Operating Margins.**

✓ Assumptions are calculated using **AVERAGE** and **STDEV** formulas from the corresponding historical operating statistics.

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.

Good work with the **INDEX, OFFSET** and **MATCH** statements within tasks 2 and 3.

✓ **INDEX** and **MATCH** functions were used successfully in task 2 for the interactive ticker symbol drop-down.

✓ **OFFSET** and **MATCH** functions are used successfully in task 3 for the interactive case scenario drop-down