

# Market Research Report Guide

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Help me write a market research report about a publicly listed company



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Certainly! Writing a market research report about a publicly listed company involves a comprehensive analysis of the company's operations, financial performance, market position, and the industry in which it operates. Below is a step-by-step guide to help you craft a thorough and insightful report.

## 1. Executive Summary

- **Objective:** Provide a snapshot of the key findings and recommendations.
- **Content:** Summarize the company's market position, financial health, and growth prospects.

## 2. Introduction

- **Company Overview:** Briefly introduce the company, including its history, mission, and core values.
- **Purpose of the Report:** Explain the objectives and scope of your research.

## 3. Company Background

- **History and Milestones:** Outline significant events that have shaped the company.
- **Product and Services:** Describe the main products or services offered.
- **Corporate Structure:** Detail subsidiaries, parent companies, and organizational hierarchy.

## 4. Industry Analysis

- **Market Size and Growth:** Provide data on the overall industry size and growth trends.
- **Market Segmentation:** Break down the market by geography, demographics, or product lines.
- **Regulatory Environment:** Highlight any laws or regulations impacting the industry.

## 5. Competitive Analysis

- **Key Competitors:** Identify main competitors and compare market shares.

- **Competitive Advantages:** Discuss what sets the company apart.
- **Market Positioning:** Analyze the company's positioning strategy in the market.

## 6. Financial Analysis

- **Financial Statements:** Examine income statements, balance sheets, and cash flow statements.
- **Key Financial Ratios:**
  - **Profitability Ratios:** Gross margin, net margin.
  - **Liquidity Ratios:** Current ratio, quick ratio.
  - **Solvency Ratios:** Debt-to-equity ratio.
  - **Efficiency Ratios:** Inventory turnover, receivables turnover.
- **Stock Performance:** Analyze historical stock prices and market capitalization.

## 7. SWOT Analysis

- **Strengths:** Internal advantages and core competencies.
- **Weaknesses:** Internal limitations and areas for improvement.
- **Opportunities:** External factors the company can capitalize on.
- **Threats:** External challenges and risks.

## 8. Marketing Strategy

- **Target Market:** Define the primary customers.
- **Marketing Mix (4 P's):**
  - **Product:** Quality, features, branding.
  - **Price:** Pricing strategy compared to competitors.
  - **Place:** Distribution channels.
  - **Promotion:** Advertising and promotional activities.

## 9. Future Outlook

- **Growth Prospects:** Discuss potential for expansion or new product lines.
- **Analyst Predictions:** Summarize forecasts from industry analysts.
- **Potential Challenges:** Highlight any foreseeable obstacles.

## 10. Conclusion and Recommendations

- **Summary:** Recap the main findings.
- **Actionable Insights:** Offer recommendations based on your analysis.

## 11. Appendices

- **Supplementary Data:** Include detailed charts, graphs, and tables.
  - **References:** List all sources used in your research.
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## Tips for Conducting Research

- **Annual Reports:** Review the company's latest annual reports and SEC filings (e.g., 10-K, 10-Q forms).
- **Market Research Databases:** Utilize databases like Statista, IBISWorld, or Bloomberg for industry data.
- **News Outlets:** Stay updated with recent news from reputable sources like The Wall Street Journal or Financial Times.
- **Analyst Reports:** Look for investment bank analyses or credit rating agency reports.
- **Company Websites:** Explore the investor relations section for presentations and press releases.

## Ethical Considerations

- **Data Accuracy:** Ensure all information is accurate and up-to-date as of my knowledge cutoff in September 2021.
- **Citations:** Properly cite all sources to avoid plagiarism.
- **Impartiality:** Present information objectively without personal bias.

## Example Outline Using Apple Inc.

1. **Executive Summary:** Highlight Apple's market dominance in consumer electronics and services.
  2. **Introduction:** Introduce Apple as a leading technology company.
  3. **Company Background:** Discuss Apple's founding, key products like the iPhone and Mac, and its innovation culture.
  4. **Industry Analysis:** Analyze the technology and consumer electronics industry, noting trends like the growth of wearable devices.
  5. **Competitive Analysis:** Compare Apple with competitors like Samsung and Google.
  6. **Financial Analysis:** Examine Apple's robust financial health, including its significant cash reserves.
  7. **SWOT Analysis:** Identify strengths like brand loyalty and weaknesses like high product prices.
  8. **Marketing Strategy:** Discuss Apple's focus on premium branding and customer experience.
  9. **Future Outlook:** Consider the impact of emerging technologies like AR/VR on Apple's growth.
  10. **Conclusion and Recommendations:** Summarize findings and suggest areas like expanding services for growth.
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By following this guide, you'll be able to create a comprehensive market research report that provides valuable insights into the company's performance and prospects. Remember to tailor each section to the specific company you're analyzing and verify all information with credible sources.



I have been researching a public company named Burford Capital (listed on LSE and NYSE) for several months and have gathered a large volume of information and evidence which I now need to compile into a written report addressing key topics and issues arising from / uncovered by my independent research.

I would like you to assist me with this task, and to that end suggest the following process/approach about which I would like your comments/feedback as to whether my proposed approach could be improved in order to ensure you are able to operate with maximum efficiency and produce optimal answers/output(s)

- (1) I will provide you with specific information and documents concerning Burford for review/analysis
- (2) I will draw your attention to relevant topics and subjects by reference to the documents, and will discuss key issues with you to resolve any questions and/or confusion if and as needed/at request
- (3) Once we have worked through each/all of the relevant documents and evidence etc, you will help me to prepare a list of important/key topics arising from our preceding discussion & your analysis
- (4) Once this list is complete, you will use the information contained in the documents and/or otherwise known (e.g., from previous conversation/s, publicly available or self-evident facts etc) to provide a Plain English summary of between 500 to 1000 words for each requested topic/issue
- (5) You will also prepare a reference list containing Oxford style citations for every source/document which we reviewed or analysed or discussed in the course of our conversation/s, and reference the information contained in/prepared for the summary section(s) referred to at (4) above where necessary and/or appropriate, using endnotes rather than footnotes.



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Your proposed approach for compiling the report on Burford Capital is well-structured and comprehensive. It allows for a systematic analysis of the information you've gathered and ensures that key topics are thoroughly addressed. Here are some comments and suggestions to potentially enhance your process for maximum efficiency and optimal output:

1. Clarify the Scope and Objectives:

- **Set Clear Goals:** Before we begin, it might be helpful to outline the primary objectives of your report. Are you focusing on financial performance, strategic positioning, legal aspects, or all of these areas?
- **Define Key Questions:** Listing specific questions you aim to answer can guide the analysis and keep discussions focused.

2. Organize the Documents:

- **Categorize Information:** Organize your documents into categories (e.g., financial reports, market analysis, legal documents) to streamline the review process.

- **Use a Shared Platform:** If possible, utilize a collaborative tool or cloud storage where documents can be easily accessed and annotated.

### 3. Efficient Review Process:

- **Prioritize Documents:** Identify the most critical documents so we can focus on those first.
- **Summarize Key Points:** For each document, provide a brief summary or highlight sections of particular interest to expedite the analysis.

### 4. Enhanced Interaction During Analysis:

- **Scheduled Discussions:** Set up regular intervals for discussion to address questions and clarify issues promptly.
- **Interactive Q&A:** Encourage an open dialogue where we can delve deeper into complex topics as they arise.

### 5. Developing the List of Key Topics:

- **Thematic Grouping:** Group related topics together to ensure a cohesive structure in your report.
- **Ranking Importance:** Prioritize topics based on their relevance and impact on your overall analysis.

### 6. Comprehensive Summaries:

- **Consistency in Format:** Use a consistent structure for each summary to enhance readability (e.g., introduction, main points, conclusions).
- **Include Visual Aids:** Where appropriate, incorporate charts or tables to illustrate key data points.

### 7. Reference Management:

- **Use Citation Software:** Consider using reference management tools like Zotero or EndNote to organize citations efficiently.
- **Double-Check Sources:** Ensure that all sources are credible and up-to-date, especially given the dynamic nature of financial markets.

### 8. Final Review and Editing:

- **Proofreading:** Allocate time for reviewing the final summaries and references to correct any errors.
- **Feedback Loop:** We can have a final discussion to address any lingering questions or make necessary adjustments.

### 9. Ethical Considerations:

- **Confidentiality:** Be mindful of any non-public information to ensure compliance with legal and ethical standards.
- **Objectivity:** Strive to present information impartially, especially on contentious issues.

### 10. Project Timeline:

- **Set Milestones:** Establish deadlines for each stage to keep the project on track.
- **Monitor Progress:** Regularly assess our progress and adjust the plan as needed.

By integrating these suggestions into your proposed approach, we can enhance the efficiency of our collaboration and produce a high-quality, insightful report on Burford Capital. I'm ready to assist you at each step and look forward to delving into the specifics of your research.



I will upload a document shortly which contains a transcription of an audio note I just prepared which is approximately 22 minutes in length and addresses background and contextual matters. In the meantime, I would like to explore/discuss certain topics/issues relevant to the 10 points above.



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Certainly! While you're preparing the transcription, I'm more than happy to begin exploring and discussing the topics and issues relevant to the 10 points we outlined earlier. Please let me know which specific points or areas you'd like to focus on first. For example, we could:

- **Clarify the scope and objectives of your report on Burford Capital.**
- **Discuss how to best organize and categorize the documents you've gathered.**
- **Prioritize the key topics and issues arising from your research.**
- **Set up an efficient review and analysis process for the documents.**

Feel free to specify any particular topics or questions you'd like to address, and we'll dive right in.



How do I upload documents for review and/or analysis?



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To help me review and analyze your documents, please copy and paste the relevant text or key excerpts directly into our conversation. If the documents are lengthy, you might consider summarizing the main points or highlighting specific sections you'd like to focus on. This approach will allow me to assist you effectively with the information you provide.