Summative Project – Corporate Analysis

Project Outline

You have recently been hired by an accounting firm and have already impressed your boss, Mr. Obama. He wants to see how you handle detailed research on a company of your choice. He has asked you to select any large corporation whose financial information is publicly available.

**Therefore, please select and sign-up for 1 company as soon as possible with Mr. Mirza.**

Mr. Obama would like you to analyze the company using the following 3 parts:

**Part 1 – General Business Information –** Length: 1 - 2 pages (single-spaced)

Research and complete general business information about the company including:

* 1. Products / services that they provide
  2. Financial highlights – use graphs, charts, tables. Source them.
  3. Future directions
  4. SWOT analysis – strengths, weaknesses, opportunities, threats (use a chart)
  5. Management’s discussion and analysis (MD&A)

**Part 2 – Financial Analysis –** Length: 1 template (5 sheets in MS Excel)

Financial analysis using the **ANALYSIS TEMPLATE** file provided in MS Excel:

1. Vertical analysis
2. Horizontal analysis
3. Ratio analysis

Using the financial statements contained in the company’s annual reports, you are to prepare a vertical and horizontal analysis for your company for 2 years. Use your discretion to determine the categories of balance sheet and income statement items to be included.

You are to conduct a complete ratio analysis for your company for the 2 most recent years. It is expected that your analysis examines the company’s liquidity, profitability, and solvency. You should try to calculate as many of the ratios as possible. Be sure to include an explanation of your results, which provides any significant findings.

**Part 3 – Current Conclusions and Future Projections –** Length: 1 - 2 pages (single-spaced)

After completing the first 2 sections of your analysis, you should have an excellent idea about both the present state and the future potential of the company. Use the following headings:

* Performance conclusions about the company in the current year
* Future projection
* Will you invest in this company?
* What advice do you have for the company’s creditors & shareholders?
* Compare and contrast your company to other companies in the same industry

**Format (RECEIVE APPROVAL FROM MR. MIRZA):**

Be creative. The final work may be displayed on a poster, 3D poster, art work, report, video, magazine, infographic or through any other visual. You can include pictures, charts, graphs, song lyrics, etc.

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Marking Scheme

**Student Name:** Dhrumil Patel

**Company:** Dell Technologies Inc.

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| **Item** | **Marks Possible** | **Marks Earned** |
| Part 1 – General Business Information(Knowledge) | 10 |  |
| Part 2 – Financial Analysis  (Application) | 10 |  |
| Part 3 – Current Conclusions & Future Projections  (Thinking) | 10 |  |
| Overall Impressions:  Spelling, Grammar, Organization  (Communication)  Format Creativity  (Communication)  Marking Scheme is printed and handed in with every summative part | 4  5  1 |  |
| **Total** | **40** |  |