UDACITY

Analyze NYSE Data

REVIEW
ANNOTATIONS 1
HISTORY

Meets Specifications

Dear Student,
Congratulations on a perfect project 🎉
You have done an outstanding job building financial statements and forecasts with complex Excel functions and business metric formulas. Your reporting and data visualization skills are excellent. 👏
Good luck with the rest of your learning journey with Udacity!

Submission Phase

A PDF report have been uploaded as part of a zipped folder.

☑You successfully submitted a PDF report as part of the zipped folder. Excellent!

Student provided an Excel file as part of a zipped folder or link to Google Sheet (in case the student used Google Sheets instead of Excel) necessary for review. This file should include their Profit and Loss statement and forecasts. The Google link should be included in the PDF or slides document.

The spreadsheet (Excel or Google Sheets) should contain individual tabs for the dataset, calculation of the summary statistics, dashboard for Profit and Loss statement, and Forecasting model with scenarios. There

can be additional tabs in the Workbook that are needed for the dashboard and forecasting model.

☑ The Summary Statistics, Profit and Loss Statement, and Forecast were submitted in separate tabs.

Exploration of Summary Statistics

Student uses the measures of center and spread and at least one numeric summary statistic to generate insights.

Stating the summary statistics is insufficient. Please include in the written description a short insight related to each one.

For example here is an insight based on mean:
The mean total revenue for companies categorized under Pharmaceutical industry ($26,325,440,909.09) was higher compared to mean total revenue for all healthcare industries ($23,142,217,458.76). It looks like companies in the Pharmaceutical industry have a higher total revenue on average than all industries categorized under Health Care.

☑ You have calculated the mean, median, and mode for the sectors under analysis. I noted the extra effort in your Summary Statistics sheet.
☑ Your interpretation of the mean, mode and median shows that you understand the significance of the measures of center.

Student uses standard deviation and range to generate insights.

Stating the standard deviation and range is insufficient. Please include in the written description a short insight related to each one.

For example, please review the finished slide example in the classroom, which can be found in the Analyze NYSE S&P 500 dataset project lesson (Finished Example Slide).

☑ The Summary Statistics sheet is thorough and includes calculations for range, standard deviation, and other measures of spread.
☑ The insight into the range and standard deviation are accurate and relevant to your discussion.

Student uses at least one plot to explore the data. The plots may include histograms, box-plots, scatterplots, and bar charts to explore data and gain insights.

All slides must contain a visualization. Screenshots of values in a table does not count.

☑ The histogram and line charts are effective in showing the key points in your discussion.

An appropriate visual is chosen to present the data. All labels are legible and the visual has appropriate axis labels.

Every visualization should have

- chart title (including which year's data the chart depicts)
- x axis title
- x axis labels
- y axis title
- y axis labels

Please refer to the finished slide example page in the classroom for an example.

☑Your charts were appropriately labeled and had descriptive titles.

Communication Phase

The results of the analysis are presented such that any limitations are clear. The analysis does not state or imply that one change causes another based solely on a correlation.

The results do not imply facts about a larger group of individuals based on descriptive values. Language is only applied to the specific data provided, unless a correct analysis beyond the course material is conducted that allows for inference.

☑Very comprehensive, professional and top-level analysis. Your conclusions have been proven statistically and are free of any causation errors.

The analysis associated with answering a particular question uses the appropriate variables, summary statistics, and plots that could provide an answer.

☑Your analysis covers all the required insights. You included an advanced interpretation of descriptive statistics to produce key financial conclusions.
☑The plots provide a clear graphic description of your conclusions.

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.

model is NOT required.

☑ Great job with the implementation of Business Metrics formulas in your P&L and Forecast.

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

☑ You have calculated pretty solid and realistic assumptions.

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.

☑ You have demonstrated a good grasp of the OFFSET and INDEX MATCH functions for the Forecast Scenarios and the P&L. Terrific work here!

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