

Name

Jonah Woo

Project Name

Financial Statement Analysis Tool

Link to GitHub repository

<https://github.com/jonahwoo/sql-project>

Job Description (1 point) (Attached pdf with job posting)

I selected this job because not only is it an entry level analyst role, which is ideal for me as a graduating student directly entering the workforce, but being able to work in the finance / investment industry is my ultimate goal. This job is relevant to my future goals in being able to use data and analytics to work within the business field to help support the company, and specifically in this role, help streamline data exchange / support the investment team. I am interested in this job because I believe I can utilize my skills I have learned throughout school to contribute to this company in this role, while also being able to work in the industry I have always visualized myself in.

Problem (1 point)

This project aims to develop a tool for analyzing the financial statements of public companies to assist investors, analysts, and financial professionals in making informed investment decisions. As this company is an investment company, this tool can assist and ideally help them make the smartest investments by fetching financial statements data and information and then performing analysis using SQL against industry peers.

Data Sources (1 point)

Alpha Vantage API: Provides real time and historical stock data

SEC Edgar Gov (Web Scrape): Provides access to many filings such as company financial reports, and can scrape information directly from a company's SEC filings.

These data sources will allow me to find information on companies that could potentially turn into an investment opportunity.

Solution (1 point)

Using the financial statement data from Alpha Vantage API and web scrape, it can be stored into a sql database which can then design and create database tables to store various financial statement components. Using sql, key financial ratios can be calculated, percentage and growth rates for different metrics over time can be used. Visualizations such as line charts and scatter plots can help visualize the data, and identify potential outliers.