**SIA Module worksheet week 2**

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| Seminar **Questions** (to check and/or develop your relevant knowledge on investment appraisal) | **Answers** (write here in your own words & underline key concepts) | e.g. **Illustrate** from last year’s case study – find this data in the annual report of the target company or the exemplar assessment | NB - **Find** the equivalent data for the assessment case study you are tasked with analysing from the annual report of target co. |
| 1. What are the main types of investment made by a company? |  | Which types of investment are most likely to be made in a food delivery service business? |  |
| 1. Why do companies buy or merge with other companies in (a) the same industry? and (b) in another industry? |  | Which rationale applied to the case study? |  |
| 1. How many shares would you need to own in a company for it to be described as having a ‘controlling interest’? |  | What % of shares did the case company bid for and how did they pay? |  |
| 1. Define the following terms    1. CAPEX    2. Fixed assets (FA)    3. Debt    4. Gearing    5. Leverage |  | Find the values for each term   1. CAPEX 2. Fixed assets (FA) 3. Debt 4. Gearing 5. Leverage |  |