

2025 FRE 516 Group Report & Presentation

Project Structure (26% Total)

Proposal (0%)

Outline of sector, company, team roles, data sources, and analysis plan for financials, sustainability, and investment analysis. No computations – just your ideas. **Deliverables:** 1- 2 pages PDF proposal plus Group contract as a separate document.

Group Report (17%)

Full analysis, written collaboratively. Sections may be divided, but should be developed together and be consistent in tone and format. **Deliverables:** 8 to 10 pages plus Data/Excel/Power Bi files plus Appendix (details). You can go over this page limit but only if it is useful and important information and you are using a professional, clear, and concise style of writing.

Group Presentation (6%)

Delivered in stages (by theme: Financials in October, Sustainability in November, Investment in December). Each group chooses one of the themes they would like to present which dictates when they will present. Allocation across months will be required as there is a max of 5 presentation spots per theme.
Deliverables: Slides

Individual Executive Summary and Limitations Video (3%)

Each student records a short (2–3 min) video presenting the individually-created executive summary and limitations of the report. **Deliverables:** (2–3 min) Zoom and Zoom video link

Dates and Rubrics: On Canvas

Format for All Written Documents:

- One document per Group should be uploaded to Canvas for all group requirements
- PDF Document, 11 point, 1.5 spacing. Citations must be provided for all references (use any format: MLA, APA).
- Use a professional business communication style (see resources on Canvas)
- For this course you MAY NOT copy/cut graphs, charts, or images even if you reference them. You can describe, recreate, link to, or refer to graphs, charts or images from other sources and then cite sources but you MAY NOT just copy and paste any items into document. I want to view and assess your original work and skills.
- AI Disclosure required for all documents. Details available on Canvas.

Group Report (17%)

Finance

Evaluate the company's financial performance, risks, strengths using statements and ratios, then compare results to market context, competition or industry benchmarks.

- **Review Statements:** Balance sheet, income statement, and cash flow.
- **Apply Ratios:** Liquidity, leverage, profitability, DuPont.
- **Outline and Compare Performance:** Against a competitor or industry averages.
- **Identify Risks & Strengths:** Highlight areas for improving financial resilience.

End with recommendations for strengthening financial performance.

Sustainability

Evaluate your company's sustainability practices and reporting.

If a Sustainability/ESG Report Exists:

- Assess initiatives in environment (e.g., carbon footprint, waste) and either social (e.g., labor, diversity) or governance (e.g., board, reporting).
- Evaluate reporting quality (data sources, transparency, climate risk disclosures).
- Identify company sustainability strengths, weaknesses (where does the company excel, where does it fall short, and how does it compare to competition or sector?)

If No Report Exists:

- Using company financials and added sources, suggest priority issues (e.g., emissions, energy, transport, food waste, packaging, water).
- Identify practical metrics, data gaps/holes/source and tracking processes for the firm.
- Outline reporting opportunities/challenges the firm may face in starting the sustainability reporting (specific to the company)

End with recommendations for strengthening sustainability resilience.

Investment

Evaluate one potential sustainability project for your company, applying investment tools to assess feasibility and financing options.

- **Select a Project Idea:** Choose one sustainability investment (e.g., energy efficiency, renewable energy, packaging). Base it on the company's reports, gaps you identified, or industry examples.
- **Estimate Costs & Benefits:** Identify the upfront cost and expected annual savings or revenues. Keep assumptions simple, clear, and cited where possible.
- **Apply Investment Tools:** Calculate NPV, IRR, and Payback. Present results in a short table.
- **Assess Financing Options:** Compare equity, debt, and green loans. Note trade-offs (cost, risk, control).
- **Decision:** State if the project should proceed, how it could be financed, and key risks/benefits.

End with a recommendation for strengthening investment resilience of the company.

Integrated Recommendation

Summarize how finance, sustainability, and investment findings connect. Show how actions in one area support the others (e.g., renewable energy improves cost savings and sustainability reporting). Provide 2–3 coordinated recommendations for the company's overall strategy. Two examples: **invest in energy efficiency retrofits:** Improves long-term cost savings (finance), reduces emissions (sustainability), and generates positive NPV and IRR (investment) and **adopt standardized sustainability reporting:** Builds transparency for investors, supports access to green financing, and strengthens peer comparisons.