

Project: Analyse NYSE Data

Project Introduction

For this project, you will conduct three tasks:

- 1) Complete your own data analysis and create a presentation to share your findings
- 2) Develop a dashboard for a Profit and Loss Statement
- 3) Create a Financial Forecasting Model using three scenarios.

You should start by taking a look at your dataset and brainstorming which sub-category and company you want to focus your data analysis on - the questions leading to this page should have assisted in this process! Then you should use spreadsheets or another Excel-like software to conduct your analysis and choose a sub-category and company you are most interested in. This project is open-ended in that there is no one right answer.

Project Goal:

Task 1:

- a. Identify the question about the data that you will answer based on your data analysis, and include this in your **slide presentation**.
 - **Your question should include at least one categorical variable (GICS Sector or GICS Sub Industry) and one quantitative variable (one of the financial metrics) and require the use of at least one of the summary statistics.**
 - **A tab within the Excel spreadsheet** that you submit should **include the summary statistics [measures of central tendency (e.g., mean, median) and measures of spread (standard deviation and range)]** you used to answer your question.
 - *Deliverable:* Slide presentation, Spreadsheet with tab for Summary statistics.
- b. **Your slide presentation** should provide **at least one visualization to help with your answer**.
 - This visualization might be a bar chart, histogram, scatterplot, box-plot or other visual that you learned to make. Include your insights from the measures of center and spread and at least one numeric summary statistic in the description.

Task 2:

- Create a **dashboard for a Profit and Loss Statement** that calculates the **Gross Profit, Operating Profit or EBIT** for a company selected from a drop-down list.
- Your drop-down list should pull historical fundamentals data to create the P&L Statement.
- The P&L statement should include the **Gross Profit, Operating Profit or EBIT values for all the years there is historical data available for that company in the dataset**.
- *Deliverable:* Spreadsheet with tab for Dynamic P&L statement

Task 3:

- Create a **financial model** for a company (different from Task 2) of your choice that forecasts out the **Gross Profit, Operating Profit or EBIT for two more years using three scenarios (Best case, Weak case and Base case)**.
- Your assumptions for revenue growth, gross margin and operating margin should change for each scenario.
- The forecasting model should be dynamic for the selection of the case (Weak, Base, Strong). However, the forecasting model can be static for the chosen company sticker symbol.
- *Deliverable:* Spreadsheet with tab for Forecasting Model