



## Mentored-Research

# Equity Research Initiative

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### Assignment 1: Fundamental & Ratio Analyses

#### **Objective:**

- Perform the fundamental and ratio analyses of the company assigned to you.
- Quantitatively analyse the company that has been allotted to you by computing its key financial ratios. Further, use these ratios to study the company vis-à-vis its competitors.
  1. Compute each financial ratio mentioned, for each financial year
  2. Observe and comment on the trends in the values of each individual ratio over time.
  3. Perform comparison analysis of each individual ratio, by comparing its value with that of the ratio for the company's competitors. This analysis is to be performed for the most recent financial year.

#### **Instructions:**

- Before beginning with your analysis, go through the Video Lectures and the ERI Guidebook.
- From the ERI Guidebook, please refer to the following sections: *Economy, Industry and Company Analysis, Ratio Analysis (Pg. 26 – 41)*
- Download the company Annual Report that has been shared with you. This is a comprehensive report of the company's annual performance.
- Study the sample assignment that has been shared to develop an understanding of the approach to be utilised
- The assignment has to be submitted in the form of a power point presentation

- Make your presentation as reader-friendly as possible - avoid presenting your answers in paragraphs, make liberal use of bullets, use graphs and tables as much as possible.
- Be original in your effort, there should be no plagiarism
- Understand the use of the formulae of the financial ratios from the Sample Assignment that has been shared.
- Download the company's financial statements that has been provided. These have been provided to you in the Central Resources Section of your [www.mentored-research.com](http://www.mentored-research.com) account.
- Apply the formulae that you have learnt on the financials of your company. Please make use the annual data to compute the ratios for a financial year.
- Calculations are to be performed in Ms-Excel, making use of the functions of Ms-Excel that you now are acquainted with
- The values of the ratios of some competitors for the latest financial year have been provided. Please download them and make use of these to compare the performance of the company vis-a-vis its competitors.
- To increase the depth of your analysis, consider competitors that have been neglected. Find these ratios the most recent financial year. Instead of calculating them, these can be found from sources like <https://in.finance.yahoo.com/>, <https://www.google.com/finance>, etc. Bring these values also onto your Excel Workbook.
- Please contact the query team in case of any trouble with the assignment.
- To broaden your horizons, please refer to the Optional Resource Material provided. This is not compulsory.

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