



## Mentored-Research

# Equity Research Initiative

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### Phase 0: Introduction to Finance and MS-Excel

#### Objective:

- Gain an understanding of the world of finance. Understand the basics and the commonly used terminology that will now be a part of your vocabulary
- Get introduced to the software Microsoft Excel. MS-Excel is a commonly used tool in the domain of finance

#### Guidelines:

- Download the Video Lectures and the ERI Guidebook. Go through them religiously
- From the ERI Guidebook, please refer to the following sections: *Investment Research and Equity Research Initiative, What is a Company?, Broad Approach of Analyzing Share Price Movement, Understanding Financial Statements* (**Pages 3 – 25**)
- Download the Unsolved Excel Workbook that has been shared. Attempt to solve the Workbook on your own, to familiarize yourself with the concepts covered
- Download the Solved Excel Workbook that has been shared to check the validity of your attempt
- To broaden your horizons, please refer to the Optional Resource Material provided. This is not compulsory.