As the new financial manager of your company, the CEO has asked your team to provide a brief analysis of the company’s performance to present at the upcoming board of directors meeting. The CEO has asked that you assess the company’s performance against your company’s industry. Thus, to do this, you will need to use ratio analysis or other techniques to determine areas in which the company is doing well, as well as areas that management should look at.

Here are the steps for the project:

1. Select your teammate. Each team should be made up of two members.
2. Determine which company you will analyze for the project. Your selection may be subject to your professor’s approval. The company that you select will likely be used for all four team projects. As such, be sure that the company has debt on its balance sheet, as this will be a requirement for future projects.
3. Go to the website for your company and download the 10-K report for the most recent year.
4. Perform your ratio analysis on your company:
   1. A good place to start would be to perform a complete DuPont analysis of the company. The DuPont analysis might provide guidance as to what particular areas of the company should be examined next and what ratios should be calculated. Be sure to include ratios that cover the following areas:
      1. Profitability
      2. Debt Management
      3. Liquidity
      4. Asset Management
      5. Market Value
   2. In addition to the DuPont analysis ratios, be sure to present and discuss at least six relevant ratios that your team feels may best assess the company’s performance.
   3. Using an online database, such as *bizstats.com* or a similar database, capture the ratio averages for your company’s industry to evaluate your company’s performance.
   4. Provide an analysis that compares your company’s ratios to the industry standards. There is no need to explain the purpose of the ratios. Rather, be sure to provide an interpretation of the results. This may entail some research from news sources on the company’s recent performance.

**Rubric: First Project**

**FIN515**

**Possible**

**Points**

0-3

4-6

7-9

10-12

No referent

provided.

Insufficient or

incorrect ratios

used.

Some ratios

questionable.

Inappropriate

referent selected.

Ratios mostly

appropriate.

Appropriate

referent

selected.

Ratios and

referent

appropriate.

0-2

3-4

5-6

7-8

Calculations not

provided or are

generally incorrect.

Not all calculations

Provided, or some

calculations are

incorrect.

Calculations are

nearly but not

totally provided

or correct.

Calculations

are provided

and are

correct.

0-3

4-6

7-9

10-12

No evaluation, or

evaluation not

based on findings

Minimal or incorrect

Evaluation, or

evaluation not

original.

Evaluation

generally correct.

May be not

completely

supported by

findings or

insufficient in

quantity.

Evaluation

fully

supported by

findings.

0-2

3-4

5-6

7-8

Significant

problems with

presentation or format.

Minor problems with

writing or presentation..

Writing and

presentation

generally

correct with a few

exceptions.

Virtually no

errors in

writing or

presentation.

**Form**

8

**Ratios selected**

12

**Calculations**

8

**Evaluation**

12

**Criteria and Point Range**