**The Owen Graduate School of Management, Vanderbilt University**

**MAcc – Masters of Accountancy, Valuation**

**Immersion Week: Business Research for Valuation Professionals**

***Assignment II: Database Scavenger Hunt & Analysis***

***for Valuation Professionals***

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For this assignment you will choose a publicly traded company, locate specific information about the company and corresponding industry, utilizing a variety of online resources and databases. This exercise is meant to be repetitive. You will provide analysis of the resources and finally provide a brief analysis of the company.

1. **Identify a publicly traded company.**

* This can be any company of your choosing, but must be located in the US and publicly traded on a major US exchange; you will have to also identify the industry in which the company resides, using both NAICS and SIC codes. **Include the company name, ticker symbol and its industry NAICS code at the top of your deliverable (see example.)**

1. **Locate and report specific data and information about the company and its corresponding industry.** 
   * The specific data and information you are to locate is outlined below **\***.
   * There are eight categories of information you will be seeking: six related to company financials, and two industry related questions.
   * Each financial category has four pre-identified resources/databases for you to utilize. These resources/databases are a mix of industry standard proprietary databases and free web resources. You must use all the identified resources, although you may also use additional databases or resources if you wish.
   * Capture a screenshot of the requested information, from each resource/database. Whole reports or spreadsheets are not necessary, just proof that you searched and then found the information for your company and its corresponding industry.
   * For each information category, provide a brief analysis of the resources utilized. Your analysis should be short, no more than a paragraph, comparing and contrasting the resources in relation to the particular information request. Use the attached guidelines for points of analysis (export capabilities, intuitiveness of use, currency of information, etc.).
   * A sample of a completed information category is attached.

\* Data and Information to search and find:

Fundamentals

Find the current **Earnings/EPS Estimates** for your company utilizing the following resources:

Bloomberg  
Capital IQ

EIKON   
Zacks (web)

Financials

Find the current and **historical balance sheet (going back as far as the resource allows, quarterly**-p**lease note the start date for historical balance sheets for each resource)**, for your company, utilizing the following resources:

Bloomberg  
CapitalIQ

CalcBench  
Yahoo!Finance (web)

Corporate Events

Find a **corporate calendar and conference call transcripts**, for your company, utilizing the following resources:

Bloomberg

CapitalIQ  
Factiva  
Seeking Alpha (Web)

SEC Fillings

Find your company’s **CEO compensation**, utilizing the following resources

Bloomberg

CapitalIQ

Intelligize

Edgar/SEC (Web)

Comparables

Locate various forms of peer comparisons for your company

Hoover’s

First Research (Intellect)

Bloomberg

Capital IQ

Data Visualization using Company Financial Data

Locate a dataset for your company in CapIQ or Bloomberg and use a data visualization tool to analyze

Industry Analysis

Locate **narrative analysis of the industry** space in which your company resides, utilizing the following resources

Hoover’s

FirstResearch (Intellect)

IBIS World

EIKON

Industry Association

Utilizing the ”Websites and Acronyms” section of First Research, the “additional resources” areas of IBISWorld, or an alternate search method, **identify one or more reputable industry associations that apply to your public company’s industry area** (examples of an industry association are the National Restaurant Association, or the American Medical Association.) Provide information about the types of information the association, and its members, may be able to provide that you have not already discovered in this assignment.

1. **Provide a brief analysis of the company within the industry context.**
   * Your analysis should be no more than one page and focus on the information you discovered during this assignment. This should be written from the viewpoint of you acting as an industry/company analyst, not as an analysis of the assignment process.
   * You may, but are not required, to utilize any information beyond what you found during this exercise.
2. **Provide a Buy, Sell or Hold recommendation for the company stock,** based upon your company and industry research and analysis.
3. As part of your research, please make note of the following Bloomberg codes to find analysis for your company within Bloomberg:
   * ANR: Analyst Recommendations
   * BICO: Bloomberg Intelligence Company Primer
   * BI: Bloomberg Intelligence Launchpad.