

# FINCB/571 Competency 2 Assessment and Rubric

**Course Title:** Corporate Finance

**Competency Assessment Title:** Shareholder Analysis

**Total Number of Points:** 100

## Assignment Directions

### Resources:

- [University of Phoenix Library Finance Resources](#)
- [Yahoo! Finance](#)

**Continue** your work with the company you selected in the Competency 1 Assessment.

**Research** your company's financial reports for 2019.

**Complete** a 2- to 3-page FAQ/shareholder analysis.

**Evaluate** economic conditions that influence company performance. Consider political, environmental, currency (money), global economics, and government influences on economic conditions.

**Compare** market conditions with the company's performance for 2019. Conclude how the market conditions that year influenced the company's performance, such as interest rates, Federal Reserve Bank monetary policy changes, or other market conditions relevant to the company you selected.

**Analyze** year-over-year performance from 2018 and 2019. Consider key metrics or ratios such as trailing PE ratio, forward PE ratio, price to book, return on assets, and return on equity in your conclusions.

**Cite** references to support your assignment.

# Competency Assessment Rubric

Assignment/Performance Criteria	<b>Mastery 100%</b>	<b>Meets Expectations 85%</b>	<b>Not Met 0%</b>
<b>1. Economic Conditions</b>  (weight 30%)	Comprehensively evaluated economic conditions that influence company performance, such as political, environmental, currency (money), global economics, and government influences on economic conditions.	Sufficiently evaluated economic conditions that influence company performance, such as political, environmental, currency (money), global economics, and government influences on economic conditions.	Insufficiently evaluated economic conditions that influence company performance, such as political, environmental, currency (money), global economics, and government influences on economic conditions or no attempt to evaluate economic conditions that influence company performance, such as political, environmental, currency (money), global economics, and government influences on economic conditions was made.
<b>2. Market Conditions</b>  (weight 35%)	Thoroughly compared 2019 market conditions with the company's performance and definitively concluded how the market conditions influenced the company's performance.	Partially compared 2019 market conditions with the company's performance and sufficiently concluded how the market conditions influenced the company's performance.	Narrowly compared 2019 market conditions with the company's performance and vaguely concluded how the market conditions influenced the company's performance or no attempt was made to compare how the market conditions influenced the company's performance or to conclude how the market conditions influenced the company's performance.
<b>3. Year-Over-Year Performance</b>  (weight 35%)	Thoroughly analyzed year-over-year performance from 2018 and 2019 and included key metrics or ratios, such as trailing PE ratio, forward PE ratio, price to book, return on assets, and return on equity in your conclusions.	Sufficiently analyzed year-over-year performance from 2018 and 2019 and included key metrics or ratios, such as trailing PE ratio, forward PE ratio, price to book, return on assets, and return on equity in your conclusions.	Insufficiently analyzed year-over-year performance from 2018 and 2019 and included key metrics or ratios, such as trailing PE ratio, forward PE ratio, price to book, return on assets, and return on equity in your conclusions or no attempt was made to analyze year-over-year performance from 2018 and 2019 and key metrics or ratios, such as trailing PE ratio, forward PE ratio, price to book, return on assets, and return on equity.