

FINCB/571 Competency 1 - Assessment and Rubric

Course Title: Corporate Finance

Competency Assessment Title: Investor Presentation

Total Number of Points: 100

Assignment Directions

Resources:

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

Select a Fortune 500 company or another company you are familiar with. Consider pharmaceuticals, computer hardware, retail, or automotive industries for your selection. If you choose a company that is not in the Fortune 500, ensure that you select a public company that offers enough financial information and key performance indicator results to complete the assignment.

Research financial information and key performance indicators for the company.

Imagine your manager has asked you to help with a presentation on the company's financial performance at the company's annual meeting.

Create a 10- to 16-slide presentation for investors to assess the company's financial growth and sustainability. Use speaker notes to convey the details you would give if you were presenting.

Complete the following in your presentation:

- Identify key performance indicators for the company you selected, including the following.
 - The company and its ticker symbol
 - Cash flow from operations
 - Price-to-earnings ratio
 - Stock dividends and the yield, if any
 - Earnings per share ratio
 - Revenue estimates for the next 12 months
 - Revenue from the previous 3 years
 - Statement of cash flows and net cash from operating, investing, and financing activities over the past 3 years
 - Average trade volume
 - Current stock price, 52-week high, and 1-year estimated stock price

- Analysts' recommendations for the stock (buy, sell, hold)
 - Market cap for the company
- Relate the stock price to the price-to-earnings ratio.
- Explain the market capitalization and what it means to the investor.
- Evaluate trends in stock price, dividend payout, and total stockholders' equity. Relate recent events or market conditions to the trends you identified.
- Determine, based on your analysis, whether you think the organization is going to meet its financial goals and the outlook for growth and sustainability, and explain why you recommend this stock for purchase.
- Cite references to support your assignment.

Competency Assessment Rubric

Assignment/Performance Criteria	<i>Mastery</i> 100%	<i>Meets Expectations</i> 85%	<i>Not Met</i> 0%
1. Key Performance Indicators <i>(weight 20%)</i>	Comprehensively identified key performance indicators for the selected company.	Partially identified key performance indicators for the selected company.	Narrowly identified key performance indicators for the selected company or no attempt to identify key performance indicators for the selected company was made.
2. Stock Price <i>(weight 15%)</i>	Clearly related the stock price to price-to-earnings ratio.	Somewhat related the stock price to price-to-earnings ratio.	Vaguely related the stock price to price-to-earnings ratio or no attempt to relate the stock price to price-to-earnings ratio was made.
3. Market Capitalization <i>(weight 15%)</i>	Completely explained the market capitalization and what it means to the investor.	Somewhat explained the market capitalization and what it means to the investor.	Vaguely explained the market capitalization and what it means to the investor or no attempt to explain the market capitalization and what it means to the investor was made.
4. Trends in Stock Price <i>(weight 25%)</i>	Thoroughly evaluated trends in stock price, dividend payout, and total stockholders' equity and related recent events or market conditions to the trends identified.	Sufficiently evaluated trends in stock price, dividend payout, and total stockholders' equity and related recent events or market conditions to the trends identified.	Partially evaluated trends in stock price, dividend payout, and total stockholders' equity and related recent events or market conditions to the trends identified or no attempt was made to evaluate trends in stock price, dividend payout, and total stockholders' equity, and did not relate recent events or market conditions to the trends identified.
5. Recommendation <i>(weight 25%)</i>	Completely determined, based on analysis, whether the organization is believed to meet its financial goals, the outlook for growth and sustainability, and thoroughly explained your reasoning for recommending this stock for purchase.	Superficially determined, based on analysis, whether the organization is believed to meet its financial goals, the outlook for growth and sustainability, and sufficiently explained the reasoning for recommending this stock for purchase.	Inadequately determined, based on analysis, whether the organization is going to meet its financial goals, the outlook for growth and sustainability, and insufficiently explained the reasoning for recommending this stock for purchase or no attempt was made to determine, based on analysis, whether the organization is going to meet its financial goals, the outlook for growth and sustainability, or the reasoning for recommending this stock for purchase.