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MBA 614

Final Project – Creating Financial Statements & Ratios for BUSM301 Students

Executive Summary

This past year, I have had the privilege of co-teaching the Business Management 301 class in the Marriott School of Management. The students in the class often have trouble organizing data into the standard financial spreadsheets. In addition, the students often have a difficult time remembering and calculating the basic 15 financial ratios that are learned in the class.

My final project seeks to alleviate some of that pain by allowing students to check their work by inputting the basic financial information of a company and seeing that information displayed very simply in all 3 financial statements. This would be a supplement to the work that they have done already, and would be a “check” on all things that they’ve done. In addition, the “Ratios” tab that is created in the spreadsheet calculates the ratios of the company so that students can check their work.

In addition to the ratios calculated from data on the “Data Entry” tab, a few additional ratios are retrieved from Yahoo Finance via a Web Query. If the stock is publicly traded, the student can input the stock ticker into a cell and see the P/E ratio, EV/EBITDA ratio, and Beta of the stock for the most recent period. This information is very valuable for students who are beginning in finance, and would be something that I would send to students so that they could learn more quickly.