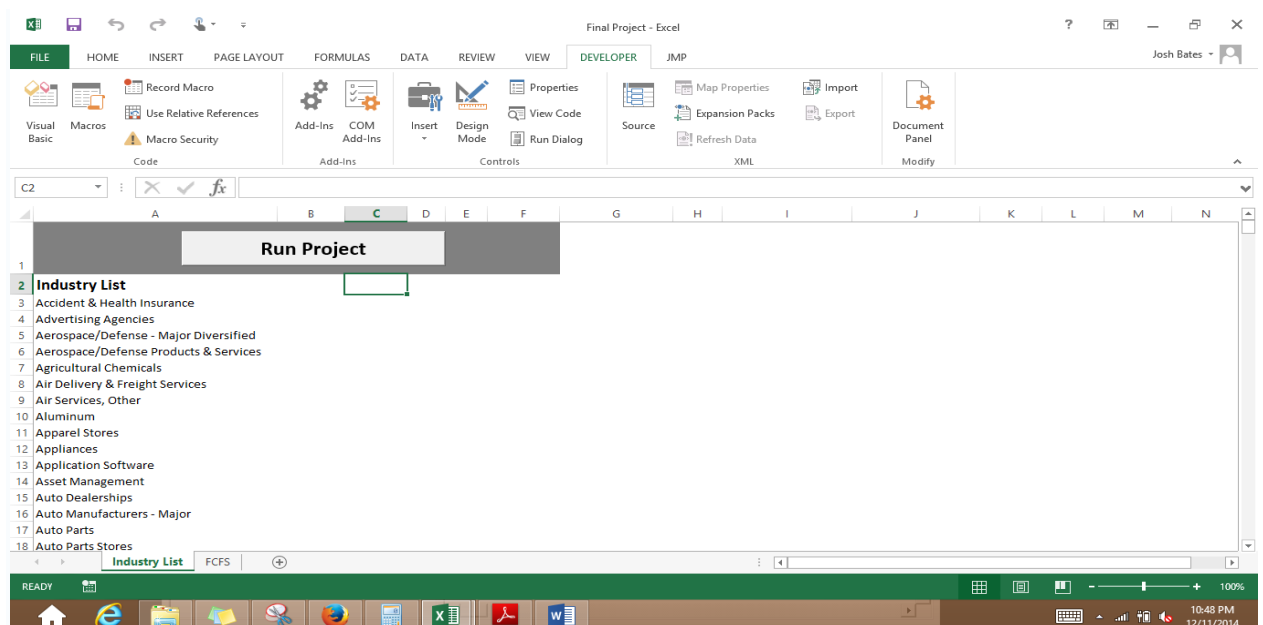## 2. Write-up for Your Project

2.1 Your write-up must be formatted as a PDF document.

2.2 Executive summary of the project. This should contain a description of the business along with an overview of the system you built
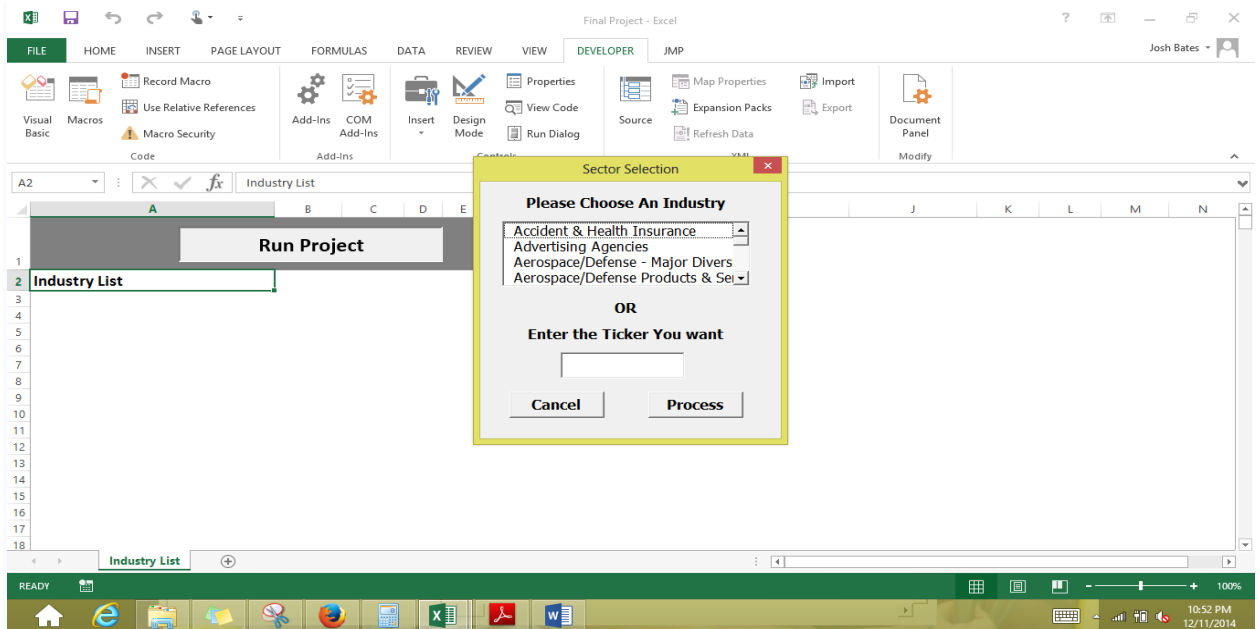
- I am currently in Silver Fund. This is an MBA class where we analyze and pick stocks to purchase then we spend really money that was donated to the school and buy them.

- There are several key indicators that somebody should look at before deciding to spend several hours investigating and analyzing a particular stock. The system I built is meant to help me grab an industry perform a key indicator analysis and rank all of the stocks in a given industry. Once I have the rankings, the next step is to pull financial sheets so I can begin the process of analyzing the stocks. There is also a function that will allow me to pick a specific stock and pull financial data on that stock. This is the scope of my project. Later, I plan on building in the analysis functionality into the VBA code, but I knew I would not have time to complete this part of the project.

2.3 Implementation documentation. Provide a concise, well-organized documentation of what you actually did for your solution. You may want to use tables or bulleted lists to describe the components of your solution and their role in the overall task. In any case, you should provide a textual description of the elements so it is clear what you have done, why it was included, how it is intended to be used in the task. Screen captures may be helpful in illustrating what you have done.

- The first thing I decided was to add buttons to each sheet. I chose not to change the ribbon because I wanted to add sheets and buttons as I went. I felt this would be easier and more consistent for a future user in the long run. Below is a picture of the first screen and button that needs to be clicked.

- After the first button is clicked the macro will ping a website and update the industry list with the latest and greatest industry list. It will also pull up a user form that will allow someone to select the industry or pick an individual stock. See screen shot below

- If you input a specific ticker it will ping another website and immediately pull open the Income statement and balance sheet and format it so you can begin to perform your analysis. This is the art part of the project and beyond the scope of what I submitted. See below screen shot.

- If, however, the person selects the industry the macro will ping 2 different websites. The first website will grab all stocks and their tickers. Because some of the tickers are foreign stocks and we are not allowed to trade foreign stocks I wrote code that removes all foreign stocks. The second website begins to populate a new sheet called Company List with several key indicators. Once the key indicators have been gathered the macro will create an average, rank the individual companies and put them in descending order. Therefore the highest scoring stocks will be at the top. See screen shot below.

- After the macro as ranked the companies you can click the Get Financials button and it will ping yet a third website and pull in the Income statement and Balance sheet for the top 2 companies in the ranking. See screen shot below.

- This is the end of the scope of my project. I can now begin to go in and create my forecasts so I can do DCF analysis of the 2 top companies

2.4 Discussion of learning and conceptual difficulties encountered. Let me know what you learned by going through this project. If there are elements you wanted to include but could not get to work, discuss these in this section. Please be sure that you have tried to solve the problem, including asking the professor for assistance, before giving up.

- I had a hard time trying to go to a website find a hyperlink and selecting the hyperlink. I had to ask Professor Meservy for help and he had to figure out a work around because the IE agent he gave us in class wasn't working properly.

- I have ran into a problem with the overall performance of the code. It is inefficient and you will need to have good internet access for this to work. I asked the Professor and Nathan to take a look and have done my best to reduce inefficiencies.

- There are several elements I started to include but were beyond the scope of what I submitted. I have commented them out so that I can work on them after finals for my own person use. There are 2 subs commented out plus 2 spots where a button has been commented out. The 2 subs are buildDCFSheets & doAnalysis. Please don't ding me. I plan on finishing these after the fact and they were beyond the scope of my original project.

2.5 Assistance: If you had substantial help from another person or persons on this project, please disclose the nature and amount of help you received in this section. If you did not receive substantial assistance, state so here.

- I feel that I did not receive substantial assistance. I asked the professor to help me with one thing and the TA to help me with another.

2.6 Write-up detail. The write-up should be of sufficient detail that the professor could grade your project just by examining the write up. That is, the write up should stand on its own merits in discussing the project without needing to refer the reader to any of the workbook for clarification.