

# 1 Company Assignment

The purpose of this assignment is to use public sources to understand a company and its operations. In particular, you are going to analyze a single company along a few different dimensions. This entire assignment should be around 1-2 pages in total. To complete the assignment, please do the following:

1. Select a Public company and report the name and ticker symbol:
  - The company cannot be Google, Meta (Facebook), Amazon, Microsoft, Apple, Netflix or Twitter.
  - Only one person can do a single company (fill out the form shared in Slack, it is first come, first serve.)
  - The company must be publicly traded with at least 2 years of annual reports. The company may be more or less than 2 years old, as long as there are 2 years of annual reports.
  - The company must have a significant data component:
    - You should be able to find numerous data scientists on LinkedIn who work at the company.
    - (and/or) They should have an obvious strategic data component, as demonstrated in the annual reports.
  - The company must be listed on a US stock exchange (NYSE, Nasdaq, etc.).
  - The company should not have significantly structurally changed in the last 3 years. No bankruptcies or mergers (the company could have acquired another company, but not merged).
2. Download the last 2 years of a company's annual reports (10-K). You should be able to find these on EDGAR (the SEC's information portal) or on the company's own web page. Answer the following questions **include data from both fiscal years**:<sup>1</sup>
  - (a) What is the name of the company and their Ticket Symbol?
  - (b) When does the company's fiscal year end/begin?
  - (c) Who is the CEO of the company?
  - (d) Who is the CFO of the company?
  - (e) Who is the auditor of the financial statement? (this should be a company like KPMG)
  - (f) The number of employees
  - (g) Total Revenue
  - (h) Net Income
  - (i) Total Assets
  - (j) Current (or Short-term Assets)
  - (k) Total Liabilities
  - (l) Calculate the following:
    - i. Revenue per Employee
    - ii. Net Income Per Employee
3. Using information from the internet (finance.google.com is a good start), report the following information (pick a recent day for reporting this information):
  - (a) Market Capitalization
  - (b) Share Price
  - (c) Number of Shares Outstanding

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<sup>1</sup>In order to answer the financial questions you should take a look at item 8: Financial Statements and Supplementary Data. The two statements which contain the information below will be the *Balance Sheet* and *Income Statement*. The Income statement is sometimes called the Statement of Operations or Statement of Earnings.

- (d) What is the (rough) relationship between the above three numbers?
4. Returning to the 10-K, read the sections called “Business” (item 1), “Risk Factors” (item 1A) and “Management’s Discussion and Analysis of Financial Condition and Results of Operations” (item 7) for the **most recent** fiscal year. From this, please create:
- (a) A short (3-5 sentences) description of the company. Make sure to answer what their core business proposition is.
  - (b) A SWOT Analysis for the company. The SWOT analysis should be about a page long, in bullet-point form. You should google “SWOT” analysis. Your goal is to analyze this in the context of the company’s future and specifically should you work for them.