

BUSINESS REPORT ASSIGNMENT (COMPANY PROFILE - ANALYTICAL)

Goals of this assignment:

- Use analytical research and writing skills (“yardstick” approach)
- Apply a formal, manuscript-style business report format
- Use secondary business research techniques (primary research optional)
- This is an exercise in company research (from a prospective investor’s point of view) that assesses the attractiveness of two companies.

Situation: Your boss wants you to compare two publicly traded companies for investment – the company you profiled earlier and another company. Thoroughly research and analyze these companies’ stability and profitability as well as their attractiveness as a potential investment. Write an objective, informal critical analysis comparing and contrasting the two companies (**Note: You select the second company**).

Audience: Your audience for the report is your instructor (boss) and fellow students (colleagues).

Length: Suggested maximum number of pages for the body of report (excludes references) is **five** complete pages. The **minimum number is three complete pages within the body (noted in bold below)**.

Contents/Criteria for Analysis:

- 1. Brief introduction (one paragraph)**
- 2. Criteria for analysis of Company A vs. Company B**
 - I. Brief descriptions of each company**
 - II. Market position/growth potential (major products and services)**
 - III. Ability to compete**
 - IV. Financial analysis (stability and profitability)**
 - V. Recent publicity (including reasons NOT to invest in each company e.g. recent layoffs, lawsuits, negative publicity, etc.**
- 3. Conclusions and Recommendations**
4. References
5. Appendix (Optional)

Contents cont.

Questions to consider as you research and write the body of your report:

I. Introduction

Please note that the brief introduction should preview upcoming sections in the report.

II. Brief description (Establish this criterion by first discussing your preference for size, age, or products of a firm. Explain your preference).

- Is this a small, mid-sized, or large company? How many employees?
- How old is the company? Is it well established or is it a relatively young firm?
- What does this company do? What are the major products or services?
- What were some of the challenges this company faced in its early beginnings?
- What were some of the key events that greatly impacted the company?

III. Market Position/Growth Potential (Establish this criterion by discussing your preference for market position and growth potential in a firm).

- How do the companies compare in terms of market position (leader in the market; new entrant)?
- How do the companies compare in terms of growth potential (innovative products or services that give each company an advantage in the market)?

IV. Ability to Compete (Establish this criterion by discussing competitive factors you value).

- Who are the top two or three competitors for each company?
- Are the two companies direct or indirect competitors?
- What products/services do the competitors offer and how are they positioned in the market versus the two companies researched?
- Are the competitors offering any innovative products/services that give them an advantage?
- What is the primary industry for these two companies and how is it doing overall?
- What are some industry trends?

V. Financial Analysis (Establish this criterion by discussing what financial factors you consider most important; use secondary data for this criterion).

- What are the analysts saying about these two companies? How do they compare? Analysts ratings and risk assessments (S&P, Morningstar)?
- How are the stocks currently valued for these two companies?
- How have the stocks performed over the past two years?
- How have the CEOs/CFOs for these companies responded to analysts' comments/critiques?

VI. Recent Publicity (Are there reasons NOT to invest in each company; identify the company that has more reasons NOT to invest in it)

- Recent layoffs?
- Major employee lawsuits (salary/wages, discrimination, harassment, etc.)?
- Major product recalls?
- Environmental issues?
- Community affairs issues?
- Negative publicity?

VII. Conclusions/Recommendation

- The conclusions should come from your findings and analysis of each company based on the criteria you established.
- Recommend the company that best meets your investment needs based on the criteria you've established.

References: Use author/date method in the body of the report; use APA (American Psychological Association) format for the reference page.

Sources: A variety of sources are permitted (internet, books, magazines, journals, analyst audio files). **A minimum of five different sources must be used.**

Format: You must use formal APA style manuscript formatting for this report (title page, table of contents, memo, etc.).

Type Format: Report must be typed using 12-point type and Times Roman or Arial font.

Spacing: The body of the report should be single spaced with double spaces between paragraphs.

Numbering: Please number all pages except for the first page (memo page).