



AFIN6013

Financial Statement Analysis and Modelling

Session 2, Special circumstances 2021

Department of Applied Finance

Contents

<u>General Information</u>	2
<u>Learning Outcomes</u>	2
<u>General Assessment Information</u>	3
<u>Assessment Tasks</u>	3
<u>Delivery and Resources</u>	5
<u>Unit Schedule</u>	6
<u>Policies and Procedures</u>	6
<u>Changes since First Published</u>	8

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Session 2 Learning and Teaching Update

The decision has been made to conduct study online for the remainder of Session 2 for all units WITHOUT mandatory on-campus learning activities. Exams for Session 2 will also be online where possible to do so.

This is due to the extension of the lockdown orders and to provide certainty around arrangements for the remainder of Session 2. We hope to return to campus beyond Session 2 as soon as it is safe and appropriate to do so.

Some classes/teaching activities cannot be moved online and must be taught on campus. You should already know if you are in one of these classes/teaching activities and your unit convenor will provide you with more information via iLearn. If you want to confirm, see the list of [units with mandatory on-campus classes/teaching activities](#).

Visit the [MQ COVID-19 information page](#) for more detail.

General Information

Unit convenor and teaching staff

Veronica Smith

veronica.smith@mq.edu.au

Credit points

10

Prerequisites

Admission to GradCertFin or GradDipAppFin or MAppFin or MAppFin(Adv) or MBkgFin

Corequisites

Co-badged status

Unit description

This unit equips students with financial analysis skills to support advanced study in corporate finance and investment analysis. Emphasis is placed on being able to interpret financial statements in the context of a company's operational performance and strategy, to assess historical financial performance and to prepare a spreadsheet based financial model capable of forecasting integrated financial statements for a company.

Important Academic Dates

Information about important academic dates including deadlines for withdrawing from units are available at <https://www.mq.edu.au/study/calendar-of-dates>

Learning Outcomes

On successful completion of this unit, you will be able to:

ULO1: Explain the main components of and the linkages between the three major financial statements.

ULO2: Critically assess a company's historical financial performance using financial ratios and other analysis tools.

ULO3: Apply financial analysis skills to develop financial projections for a project or business.

ULO4: Construct spreadsheet based integrated financial models.

ULO5: Demonstrate proficiency in using spreadsheet based financial modelling to solve a range of finance based problems

General Assessment Information

Assessment criteria (including information about late submissions and extensions) for all assessment tasks will be provided on the unit iLearn site.

Assessment Tasks

Name	Weighting	Hurdle	Due
Practice quizzes	0%	No	Week 1, 2, 3
Quizzes and short questions exercise	30%	No	Various, check ilearn for more details
Assignment	30%	No	Week 11
Final Examination	40%	No	University Examination Period

Practice quizzes

Assessment Type ¹: Quiz/Test

Indicative Time on Task ²: 2 hours

Due: **Week 1, 2, 3**

Weighting: **0%**

The practice quiz consists of multiple choice and/or short answer questions. Please use the practice quizzes as an indicator of whether you are progressing satisfactorily in the unit.

On successful completion you will be able to:

- Explain the main components of and the linkages between the three major financial statements.
- Critically assess a company's historical financial performance using financial ratios and other analysis tools.

Quizzes and short questions exercise

Assessment Type ¹: Quiz/Test

Indicative Time on Task ²: 20 hours

Due: **Various, check ilearn for more details**

Weighting: **30%**

Two quizzes and one short questions exercise will be conducted. They are of various weightings

and in total contribute 30% to the course final mark.

On successful completion you will be able to:

- Explain the main components of and the linkages between the three major financial statements.
- Critically assess a company's historical financial performance using financial ratios and other analysis tools.
- Apply financial analysis skills to develop financial projections for a project or business.
- Construct spreadsheet based integrated financial models.

Assignment

Assessment Type ¹: Modelling task

Indicative Time on Task ²: 20 hours

Due: **Week 11**

Weighting: **30%**

Students will be required to conduct spreadsheet analysis and write a report based on the findings.

On successful completion you will be able to:

- Explain the main components of and the linkages between the three major financial statements.
- Critically assess a company's historical financial performance using financial ratios and other analysis tools.
- Apply financial analysis skills to develop financial projections for a project or business.
- Construct spreadsheet based integrated financial models.
- Demonstrate proficiency in using spreadsheet based financial modelling to solve a range of finance based problems

Final Examination

Assessment Type ¹: Examination

Indicative Time on Task ²: 20 hours

Due: **University Examination Period**

Weighting: **40%**

A two hour exam will be held during the University Examination Period.

On successful completion you will be able to:

- Explain the main components of and the linkages between the three major financial statements.
- Critically assess a company's historical financial performance using financial ratios and other analysis tools.

¹ If you need help with your assignment, please contact:

- the academic teaching staff in your unit for guidance in understanding or completing this type of assessment
- the [Writing Centre](#) for academic skills support.

² Indicative time-on-task is an estimate of the time required for completion of the assessment task and is subject to individual variation

Delivery and Resources

Required Text:

Accounting, 9th Edition, By Tracie Miller-Nobles, Brenda Mattison, Ella Mae Matsumura, Peter Best, David Keene, Published in 2020 by Pearson Education Australia

Recommended Text:

Building Financial Models: The Complete Guide to Designing, Building, and Applying Projection Models, Third Edition, By John S. Tjia, Published in 2018 by McGraw-Hill Education

Unit Web Page:

This unit will make use of the University's iLearn system and students.

- Found by logging on to iLearn ilearn.mq.edu.au, then clicking on Financial Statement Analysis and Modelling.
- This is where you will find forums, downloadable resources and links to important pages.
- Students are requested to contact the lecturer via the "Contact teaching staff" link on learn. This is preferred method for students to receive quick feedback.
- The forum allows you to communicate with other students.
- You are requested to post your questions on the forums at least 48 hours prior to the assignment submission date or the examination date. Questions posted after that time may not be answered. Please try to not leave your questions to the last few days.

- It is important that you familiarise yourself with the Unit's iLearn site.
- All students should check iLearn regularly and look for updates and distribution of materials related to the unit or assessments and participate in forum discussions.

Technology Used and Required:

Assumed access to technology: Access to a computer with word processing and spreadsheet capability is assumed, as is general student computer literacy. A recent version of Excel is the preferred choice spreadsheet.

Delivery Format and Other Details:

See timetable for classes on the University web site at: <https://timetables.mq.edu.au/2021/>

Recommended Readings:

- Additional readings are included in iLearn
- Students should assume these readings are examinable unless otherwise advised.

Unit Schedule

Please refer to iLearn

Policies and Procedures

Macquarie University policies and procedures are accessible from [Policy Central](https://policies.mq.edu.au) (<https://policies.mq.edu.au>). Students should be aware of the following policies in particular with regard to Learning and Teaching:

- [Academic Appeals Policy](#)
- [Academic Integrity Policy](#)
- [Academic Progression Policy](#)
- [Assessment Policy](#)
- [Fitness to Practice Procedure](#)
- [Grade Appeal Policy](#)
- [Complaint Management Procedure for Students and Members of the Public](#)
- [Special Consideration Policy](#)

Students seeking more policy resources can visit [Student Policies](https://students.mq.edu.au/support/study/policies) (<https://students.mq.edu.au/support/study/policies>). It is your one-stop-shop for the key policies you need to know about throughout your undergraduate student journey.

To find other policies relating to Teaching and Learning, visit [Policy Central](https://policies.mq.edu.au) (<https://policies.mq.edu.au>) and use the [search tool](#).

Student Code of Conduct

Macquarie University students have a responsibility to be familiar with the Student Code of Conduct: <https://students.mq.edu.au/admin/other-resources/student-conduct>

Results

Results published on platform other than [eStudent](#), (eg. iLearn, Coursera etc.) or released directly by your Unit Convenor, are not confirmed as they are subject to final approval by the University. Once approved, final results will be sent to your student email address and will be made available in [eStudent](#). For more information visit <ask.mq.edu.au> or if you are a Global MBA student contact globalmba.support@mq.edu.au

Student Support

Macquarie University provides a range of support services for students. For details, visit <http://students.mq.edu.au/support/>

Learning Skills

Learning Skills (mq.edu.au/learningskills) provides academic writing resources and study strategies to help you improve your marks and take control of your study.

- [Getting help with your assignment](#)
- [Workshops](#)
- [StudyWise](#)
- [Academic Integrity Module](#)

The Library provides online and face to face support to help you find and use relevant information resources.

- [Subject and Research Guides](#)
- [Ask a Librarian](#)

Student Services and Support

Students with a disability are encouraged to contact the [Disability Service](#) who can provide appropriate help with any issues that arise during their studies.

Student Enquiries

For all student enquiries, visit Student Connect at <ask.mq.edu.au>

If you are a Global MBA student contact globalmba.support@mq.edu.au

IT Help

For help with University computer systems and technology, visit http://www.mq.edu.au/about_us/offices_and_units/information_technology/help/.

When using the University's IT, you must adhere to the [Acceptable Use of IT Resources Policy](#).

The policy applies to all who connect to the MQ network including students.

Changes since First Published

Date	Description
15/08/2021	updated UC details
18/07/2021	UC contact details updated