AFIN6013
Financial Statement Analysis and Modelling
Session 1, In person-scheduled-weekday, North Ryde 2024

Department of Applied Finance

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General Information

Unit convenor and teaching staff
Di Bu
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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

Late Assessment Submission Penalty (written assessments)

Unless a Special Consideration request has been submitted and approved, a 5% penalty (of the total possible mark) will be applied each day a written assessment is not submitted, up until the 7th day (including weekends). After the 7th day, a grade of ‘0’ will be awarded even if the assessment is submitted. Submission time for all written assessments is set at 11.55pm. A 1-hour grace period is provided to students who experience a technical concern.

For any late submissions of time-sensitive tasks, such as scheduled tests/exams, performance assessments/presentations, and/or scheduled practical assessments/labs, students need to submit an application for Special Consideration.

Assessment Tasks

<table>
<thead>
<tr>
<th>Name</th>
<th>Weighting</th>
<th>Hurdle</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quizzes and short questions exercise</td>
<td>30%</td>
<td>No</td>
<td>Week5, week11 and week12</td>
</tr>
<tr>
<td>Assignment</td>
<td>30%</td>
<td>No</td>
<td>week 11</td>
</tr>
<tr>
<td>Final Examination</td>
<td>40%</td>
<td>No</td>
<td>University’s formal examination period</td>
</tr>
</tbody>
</table>

Quizzes and short questions exercise

Assessment Type 1: Quiz/Test
Indicative Time on Task 2: 20 hours
Due: Week5, week11 and week12
Weighting: 30%

Quizzes and short question exercises 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
Assignment 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’s formal 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.
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.

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

TBA

Policies and Procedures

Macquarie University policies and procedures are accessible from Policy Central (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
- Assessment Procedure
- Complaints Resolution 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). 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) 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
Academic Integrity
At Macquarie, we believe academic integrity – honesty, respect, trust, responsibility, fairness and courage – is at the core of learning, teaching and research. We recognise that meeting the expectations required to complete your assessments can be challenging. So, we offer you a range of resources and services to help you reach your potential, including free online writing and maths support, academic skills development and wellbeing consultations.

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

The Writing Centre
The Writing Centre provides resources to develop your English language proficiency, academic writing, and communication skills.

- Workshops
- Chat with a WriteWISE peer writing leader
- Access StudyWISE
- Upload an assignment to Studiosity
- Complete the 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
Macquarie University offers a range of Student Support Services including:

- IT Support
- Accessibility and disability support with study
- Mental health support
- Safety support to respond to bullying, harassment, sexual harassment and sexual assault
- Social support including information about finances, tenancy and legal issues
- Student Advocacy provides independent advice on MQ policies, procedures, and processes

Student Enquiries
Got a question? Ask us via AskMQ, or contact Service Connect.
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.

Unit information based on version 2024.03 of the Handbook