

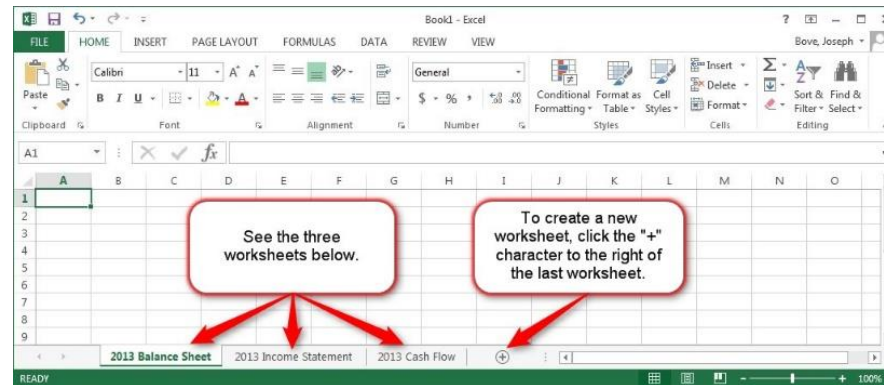
FIN 320 Module Three Excel Assignment Rubric

This is the first of two Excel assignments you will complete in this course. Before you get started, be sure to watch the [Mergent Online](#) video (written instructions can be found [here](#)). For this assignment, consider the stock you own in your TDAU thinkorswim portfolio. Choose one of the companies from your portfolio and complete the following steps:

1. Financial Reports

For the company you have selected, find the most recent annual balance sheet, annual income statement, and annual statement of cash flows.

Copy each of these three reports to its own worksheet within a single Excel file. The first worksheet should be titled **20XX Balance Sheet**; the second, **20XX Income Statement**; the third, **20XX Cash Flow**. (Replace the XX with the appropriate year.) The image below illustrates the way the file should be set up.



2. Stock Prices

Create a fourth worksheet within the same Excel file for historical stock prices. (You can name the worksheet **Stock Prices**.)

- Reference the **To Find Historical Stock Prices** section of the Mergent Online [written instructions](#) to locate the stock prices for your company for the **most recent seven days**. In your Excel file, enter those seven prices.
- On the Stock Prices worksheet, use an Excel formula to calculate the stock price's rate of return over that seven-day period. To do this,
 1. Subtract the stock price of the first day from the stock price of the last day.
 2. Divide this amount by the stock price from the first day.
 3. Multiply by 100 to get the rate of return.

3. **Professionalism**

Format the data on all worksheets so that the file has a neat and professional appearance.

4. **References**

At the bottom of each data tab in the spreadsheet, include a link and a properly formatted citation referencing the location of the data used.

Guidelines for Submission: Submit an Excel file that meets the criteria described in the prompt. Citations should be formatted according to APA style.

Critical Elements	Proficient (100%)	Needs Improvement (75%)	Not Evident (0%)	Value
Financial Reports	Includes annual balance sheet, annual income statement, and annual statement of cash flows for the company selected	Includes annual balance sheet, annual income statement, and annual statement of cash flows for the company selected, but submission is incomplete or contains inaccuracies	Does not include annual balance sheet, annual income statement, and annual statement of cash flows for the company selected	25
Stock Prices	Accurately calculates the stock's rate of return over the seven-day period	Calculates the stock's rate of return over the seven-day period, but calculation contains inaccuracies	Does not calculate the stock's rate of return over the seven-day period	45
Professionalism	Formats data with a neat and professional appearance	Formats data with a neat and professional appearance, but contains some formatting issues	Does not format data with a neat and professional appearance	15
References	Includes properly formatted APA-style citations and links with no errors	Includes citations and links, but citations contain some errors	Does not include properly formatted APA-style citations or include citations and links with major errors	15
Earned Total				100%