THE OHIO STATE UNIVERSITY
FISHER COLLEGE OF BUSINESS

Honors Financial Data
BUSFIN: 4202H Fall 2025
Course Description and Syllabus
Tuesday/Thursday 12:45 p.m. – 2:05 p.m. in GE 245

Instructor: Tod Schneider
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Office Hours: Tuesday 10am-12pm

Instructor: Matt Sheridan
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Office: 306 Fisher Hall
Office Hours: Fridays 1-3 p.m.

Course Description:
This hands-on course covers the application of financial software tools and financial modeling. You will be exposed to real world applications used in corporate finance, investment banking, private equity, and asset management. You will complete and apply models relating to various finance topics such as: forecasting, project analysis, capital budgeting, financial statement analysis, intrinsic valuation, and portfolio management.

Prerequisites: Admission to the Finance Honors Program

Course Objectives:
This course will utilize Excel, Bloomberg, Capital IQ, Morningstar, and other financial market data software. The course objectives include:

- Efficiently find and download financial data
- Develop financial modeling skills
- Ability to analyze and manipulate data
- Deal with uncertainty and imperfect information
- Draw conclusions based on data analysis

Text and Materials (Required):
Case studies - https://hbsp.harvard.edu/import/1321232
Additional Course Materials will be posted on Carmen

The following schedule is tentative and subject to change based on how the class progresses.

Week	Topic	Assignment
1	Course overview Find – EDGAR, Yahoo Finance, FINRA, FRED, FF, IBIS, NetAdvantage, Privco,	
2	Find -- ValueLine, Morningstar, ETF.com, Estimize Format – Basic Excel Formatting / Golden Rule / Graph & Print	Carmen Quiz Due
3	Format – Format - Best practices in financial modeling case Formula – Net Present Value, Logic, Regression, Scenario/Sensitivity	
4	Formula – Net Present Value, Logic, Regression, Scenario/Sensitivity (con't)	Carmen Quiz Due

	Formula – Simple DCF	
5	Formula Quiz Saito Solar case: Discounted cash flow model	Saito Solar Case Due Install Anaconda
6	Python – Basics Python – Pandas, Numpy, FMP/FRED API	
7	Python presentations Python presentations	Python project presentations
8	Current state of the financial markets illustrated by market data 10/16 Fall Break (No Class)	
9	Library Datasets Bloomberg Introduction & Navigation Bloomberg Functionality: News & Industry	
10	Bloomberg Functionality: Equity Bloomberg Functionality: Fixed Income	
11	Morningstar: Fund Analysis Bloomberg Functionality: Mutual Funds, ETFs, and Portfolio Analytics	BMC Due 11/9
12	11/11 Veterans Day (No Class) Industry & Company Analysis Project Presentations	Industry & Company Analysis Project Due
13	Industry & Company Analysis Project Presentations Bloomberg Functionality: FX & Commodities	
14	Capital IQ 11/27 Thanksgiving Break (No Class)	
15	Bloomberg Excel Formulas 12/4 Final Project Presentations	
16	12/9 Final Project Presentations	Final Project Due

Grading:

Find Quiz – Carmen (take home)	10%
Formula Quiz – Carmen (in-class)	10%
Saito Solar Discounted Cash Flow case	10%
Python Presentations	10%
Bloomberg Market Concepts & Individual Market Data Assignments	20%
Industry & Company Analysis Project	20%
Final Project	20%

Please note:

- No extra credit will be offered
- Grades will be determined at the end of the term. Any curve, if there is one, is set at that time
- Grades will not be changed except for a mathematical error

Projects: In-depth group project instructions will be posted on Carmen.

Quizzes: assess understanding of concepts covered in class through application. Quizzes will be completed ***individually*** and consist of a combination of multiple choice, fill in the blank and file upload.

Bloomberg Market Concepts (BMC): is a 10-hour, self-paced e-learning course that provides an interactive introduction to the financial markets. BMC consists of 5 modules—Economic Indicators, Currencies, Fixed Income, Equities, and Getting Started on the Terminal—woven together from Bloomberg data, news, analytics and television

Credit Hours and Work Expectations
This is a 3 credit-hour course. According to Ohio State bylaws on instruction (go.osu.edu/credithours), students spend two hours outside of class for every hour spent in class. Since this course meets 3 hours per week, you should expect to spend 6 hours per week outside of class on course-related work. Thus, you should be spending at least six hours per week outside of class on this course alone. That time should be spent reading the required material, taking notes on what you were reading, reviewing lecture notes, meeting with class colleagues in going over what you have learned, working on homework problems, reading current investment news.

Instructor Feedback and Response Time
I am providing the following list to give you an idea of my intended availability throughout the course. Remember that you can call 614-688-4357 (HELP) at any time if you have a technical problem.
- **Preferred contact method:** If you have a question, please contact me first through my Ohio State email address. I will reply to emails **Monday – Friday within 24 hours on days when class is in session at the university.**
- **Class announcements:** I will send all important class-wide messages through the Announcements tool in CarmenCanvas. Please check your notification preferences (go.osu.edu/canvas-notifications) to ensure you receive these messages.

Academic Integrity Policy
Academic integrity is essential to maintaining an environment that fosters excellence in teaching, research, and other educational and scholarly activities. Thus, The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the university's Code of Student Conduct (studentconduct.osu.edu), and that all students will complete all academic and scholarly assignments with fairness and honesty. Students must recognize that failure to follow the rules and guidelines established in the university's *Code of Student Conduct* and this syllabus may constitute "Academic Misconduct."

The Ohio State University's *Code of Student Conduct* (Section 3335-23-04) defines academic misconduct as: "Any activity that tends to compromise the academic integrity of the university or subvert the educational process." Examples of academic misconduct include (but are not limited to) plagiarism, collusion (unauthorized collaboration), copying the work of another student, and possession of unauthorized materials during an examination. Ignorance of the university's *Code of Student Conduct* is never considered an excuse for academic misconduct, so I recommend that you review the *Code of Student Conduct* and, specifically, the sections dealing with academic misconduct.

All students enrolled in this course are responsible for abiding by the guidelines outlined in the University's Code of Student Conduct. According to University Rule 3335-31-02, all suspected cases of academic misconduct will be reported to the Committee on Academic Misconduct.

If I suspect that a student has committed academic misconduct in this course, I am obligated by University Rules to report my suspicions to the Committee on Academic Misconduct. If COAM determines that you have violated the university's *Code of Student Conduct* (i.e., committed academic misconduct), the sanctions for the misconduct could include a failing grade in this course and suspension or dismissal from the university.

If you have any questions about the above policy or what constitutes academic misconduct in this course, please contact me.
Other sources of information on academic misconduct (integrity) to which you can refer include:
- [Committee on Academic Misconduct](go.osu.edu/coam) (go.osu.edu/coam)
- [Ten Suggestions for Preserving Academic Integrity](go.osu.edu/ten-suggestions) (go.osu.edu/ten-suggestions)
- [Eight Cardinal Rules of Academic Integrity](go.osu.edu/cardinal-rules) (go.osu.edu/cardinal-rules)

Use of Artificial Intelligence (AI)
There has been a significant increase in the popularity and availability of a variety of generative artificial intelligence (AI) tools. These tools will help shape the future of work, research and technology but when used in the wrong way, they can stand in conflict with academic integrity at Ohio State.

Unless I specifically mention otherwise (and in writing), the use of any AI-generated content in any deliverables in this course will be considered academic misconduct and will be acted on as such. In addition, students are not to submit their work without acknowledging any word-for-word use and/or paraphrasing of writing, ideas or other work that is not your own. You need to complete the assignments using data you have researched, your own brain, and your own thinking.

Copyright for Instructional Materials
The materials used in connection with this course may be subject to copyright protection and are only for the use of students officially enrolled in the course for the educational purposes associated with the course. Copyright law must be considered before copying, retaining, or disseminating materials outside of the course.

Mental Health Services
As a student you may experience a range of issues that can cause barriers to learning, such as strained relationships, increased anxiety, alcohol/drug problems, feeling down, difficulty concentrating and/or lack of motivation. These mental health concerns or stressful events may lead to diminished academic performance or reduce a student's ability to participate in daily activities. The Ohio State University's Student Life Counseling and Consultation Service (CCS) is here to support you. If you find yourself feeling isolated, anxious or overwhelmed, [on-demand mental health resources](go.osu.edu/ccsondemand) (go.osu.edu/ccsondemand) are available. You can reach an on-call counselor when CCS is closed at [614- 292-5766](tel:614-292-5766). 24-hour emergency help is available through the [National Suicide Prevention Lifeline website](suicidepreventionlifeline.org) (suicidepreventionlifeline.org) or by calling [1-800-273-8255(TALK)](tel:1-800-273-8255). [The Ohio State Wellness app](go.osu.edu/wellnessapp) (go.osu.edu/wellnessapp) is also a great resource.

Accessibility Accommodations for Students with Disabilities
The university strives to make all learning experiences as accessible as possible. If you anticipate or experience academic barriers based on your disability including mental health, chronic or temporary medical conditions, please let me know immediately so that we can privately discuss options. To establish reasonable accommodations, I may request that you register with Student Life Disability Services (SLDS). After registration, make arrangements with me as soon as possible to discuss your accommodations so that they may be implemented in a timely fashion.
Disability Services Contact Information
- Phone: 614-292-3307
- Website: slds.osu.edu
- Email: slds@osu.edu
- In person: Baker Hall 098, 113 W. 12th Avenue

Religious accommodations
Ohio State has had a longstanding practice of making reasonable academic accommodations for students' religious beliefs and practices in accordance with applicable law. In 2023, Ohio State updated its practice to align with new state legislation. Under this new provision, students must be in early communication with their instructors regarding any known accommodation requests for religious beliefs and practices, providing notice of specific dates for which they request alternative accommodations within 14 days after the first instructional day of the course. Instructors in turn shall not question the sincerity of a student's religious or spiritual belief system in reviewing such requests and shall keep requests for accommodations confidential.

With sufficient notice, instructors will provide students with reasonable alternative accommodations with regard to examinations and other academic requirements with respect to students' sincerely held religious beliefs and practices by allowing up to three absences each semester for the student to attend or participate in religious activities. Examples of religious accommodations can include, but are not limited to, rescheduling an exam, altering the time of a student's presentation, allowing make-up assignments to substitute for missed class work, or flexibility in due dates or research responsibilities. If concerns arise about a requested accommodation, instructors are to consult their tenure initiating unit head for assistance.

A student's request for time off shall be provided if the student's sincerely held religious belief or practice severely affects the student's ability to take an exam or meet an academic requirement and the student has notified their instructor, in writing during the first 14 days after the course begins, of the date of each absence. Although students are required to provide notice within the first 14 days after a course begins, instructors are strongly encouraged to work with the student to provide a reasonable accommodation if a request is made outside the notice period. A student may not be penalized for an absence approved under this policy.

If students have questions or disputes related to academic accommodations, they should contact their course instructor, and then their department or college office. For questions or to report discrimination or harassment based on religion, individuals should contact the Civil Rights Compliance Office.

Disenrollment
Fisher College University Rule 3335-8-33 provides that a student may be disenrolled after the third instructional day of the quarter, the first Friday of the quarter, or the student's second class session of

the course, whichever occurs first, if the student fails to attend the scheduled course without giving prior notification to the instructor.

Weather or other short-term closing
Should in-person classes be canceled, I will notify you as to which alternative methods of teaching will be offered to ensure continuity of instruction for this class. Communication will be provided via Announcements on Carmen.