



**THE OHIO STATE UNIVERSITY**  
FISHER COLLEGE OF BUSINESS

**Honors Financial Data**  
**Course Description and Syllabus**  
**Fall 2021 Busfin: 4202H 11:10 a.m. – 12:30 p.m. in SB 209**

**Instructor:** Tod Schneider  
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**Office Hours:** TBD

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**Office Hours:** By appointment

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**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](#)

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	8/26 Introductions & course overview	
2	8/30 Current state of the financial markets illustrated by market data 9/1 Library Datasets	
3	9/6 Labor Day (No Class) 9/8 Bloomberg Introduction & Navigation	
4	9/13 Bloomberg Functionality: News & Industry 9/15 Bloomberg Functionality: Equity	

5	9/20 Bloomberg Functionality: Fixed Income 9/22 Investing & Fund Analysis	BMC Due 9/26
6	9/27 Morningstar & Bloomberg Portfolio Analytics 9/29 Industry & Company Analysis Project Presentations	Industry & Company Analysis Project Due
7	10/4 Capital IQ 10/6 Bloomberg Functionality: FX & Commodities	
8	10/11 Bloomberg Excel Formulas & Refinitiv Eikon 10/13 401K Project Presentations	401K Project Due
9	10/18 Find – EDGAR, Yahoo Finance, FINRA, FRED, FF, IBIS, NetAdvantage, Privco, 10/20 Find -- ValueLine, Morningstar, ETF.com, Estimize	
10	10/25 Format – Basic Excel Formatting / Golden Rule / Graph & Print 10/27 Format – Format - Best practices in financial modeling	Carmen Quiz Due
11	11/1 Formula – Net Present Value, Logic, Regression, Scenario/Sensitivity 11/3 Formula – Net Present Value, Logic, Regression, Scenario/Sensitivity (con't)	
12	11/8 – Formula – Simple DCF 11/10 - Formula Quiz	Carmen Quiz (in-class)
13	11/15 - Saito Solar case: Discounted cash flow model 11/17 - Python – Basics	Saito Solar Case Due Install Anaconda
14	11/22 - Python – Pandas, Numpy 11/24 – Python – FMP/FRED API	
15	11/29 – Python presentations 12/1 – Python presentations	Python project presentations
16	12/6 & 12/8 Final Project Presentations	Final Project Due

### Grading:

Bloomberg Market Concepts	10%
Industry & Company Analysis Project	15%
401K Mutual Fund Evaluation Project	15%
Find Quiz – Carmen (take home)	10%
Formula Quiz – Carmen (in-class)	10%
Saito Solar Discounted Cash Flow case	10%
Python Presentations	10%
Final Project	20%

No extra credit offered. Grades will be determined at the end of the term. Any curve, if there is one, is set at that time.

**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.

**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.

### **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](http://studentconduct.osu.edu) (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.

**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](http://go.osu.edu/coam) (go.osu.edu/coam)
- [Ten Suggestions for Preserving Academic Integrity](http://go.osu.edu/ten-suggestions) (go.osu.edu/ten-suggestions)
- [Eight Cardinal Rules of Academic Integrity](http://go.osu.edu/cardinal-rules) (go.osu.edu/cardinal-rules)

### **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.

## **Creating an Environment Free from Harassment, Discrimination, and Sexual Misconduct**

The Ohio State University is committed to building and maintaining a community to reflect diversity and to improve opportunities for all. All Buckeyes have the right to be free from harassment, discrimination, and sexual misconduct. Ohio State does not discriminate on the basis of age, ancestry, color, disability, ethnicity, gender, gender identity or expression, genetic information, HIV/AIDS status, military status, national origin, pregnancy (childbirth, false pregnancy, termination of pregnancy, or recovery therefrom), race, religion, sex, sexual orientation, or protected veteran status, or any other bases under the law, in its activities, academic programs, admission, and employment. Members of the university community also have the right to be free from all forms of sexual misconduct: sexual harassment, sexual assault, relationship violence, stalking, and sexual exploitation.

To report harassment, discrimination, sexual misconduct, or retaliation and/or seek confidential and non-confidential resources and supportive measures, contact the Office of Institutional Equity:

Online reporting form at [equity.osu.edu](https://equity.osu.edu),  
Call 614-247-5838 or TTY 614-688-8605,  
Or email [equity@osu.edu](mailto:equity@osu.edu)

The university is committed to stopping sexual misconduct, preventing its recurrence, eliminating any hostile environment, and remedying its discriminatory effects. All university employees have reporting responsibilities to the Office of Institutional Equity to ensure the university can take appropriate action:

- All university employees, except those exempted by legal privilege of confidentiality or expressly identified as a confidential reporter, have an obligation to report incidents of sexual assault immediately.
- The following employees have an obligation to report all other forms of sexual misconduct as soon as practicable but at most within five workdays of becoming aware of such information: 1. Any human resource professional (HRP); 2. Anyone who supervises faculty, staff, students, or volunteers; 3. Chair/director; and 4. Faculty member.

## **Your Mental Health**

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. No matter where you are engaged in distance learning, 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](https://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:6142925766). **24-hour emergency help** is available through the [National Suicide Prevention Lifeline website](https://suicidepreventionlifeline.org) (suicidepreventionlifeline.org) or by calling [1-800-273-8255\(TALK\)](tel:18002738255). [The Ohio State Wellness app](#)

## **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.

**Student COVID-related Accommodation Process:**

The university is committed to supporting students and program participants with COVID-19 based risk factors. Student Life Disability Services, in conjunction with the Office of Institutional Equity, will work with students who are vulnerable to complications from COVID-19 to ensure that they have the necessary resources to participate in university life as safely as possible. Ohio State students from any campus may submit a [COVID-related accommodation request](#). Students registered with Student Life Disability Services can work directly with their [assigned Access Specialist](#) to modify their accommodations or make additional COVID-based accommodation requests.

**Disability Services Contact Information**

- Phone: [614-292-3307](tel:614-292-3307)
- Website: [slds.osu.edu](http://slds.osu.edu)
- Email: [slds@osu.edu](mailto:slds@osu.edu)
- In person: [Baker Hall 098, 113 W. 12th Avenue](#)

**Safety and health requirements**

All teaching staff and students are required to comply with and stay up to date on all [University safety and health guidance](#), which includes wearing a face mask in any indoor space and maintaining a safe physical distance at all times. Non-compliance will be warned first and disciplinary actions will be taken for repeated offenses.

**Disenrollment:**

Any student who fails to attend without giving prior notification to the instructor will be dis-enrolled after the third instructional day of the term, the first Friday of the term, or the second scheduled class meeting of the course, whichever occurs first, per OSU attendance policy.

**Credit hours and work expectations:** This is a 3 credit-hour course. According to [Ohio State bylaws on instruction](#) ([go.osu.edu/credithours](http://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.