

**Honors Financial Data**

**Autum 2025 Busfin: 4202H**

**Course Description and Syllabus**

**Tuesday/Thursday 12:45 p.m. – 2:45 p.m. in GE 210**

**Instructor:** Tod Schneider **Instructor:** Matt Sheridan

**E-mail:** schneider.275@osu.edu **E-mail:** sheridan.146@osu.edu

**Office:** 255B Fisher Hall **Office:** 306 Fisher Hall

**Phone:** (614) 688-1297

**Office Hours:** Tuesday 10am-12pm  **Office Hours:** Fridays 2-4 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 |  |
| 3 | Format – Format - Best practices in financial modeling  Formula – Net Present Value, Logic, Regression, Scenario/Sensitivity | Carmen Quiz Due |
| 4 | Formula – Net Present Value, Logic, Regression, Scenario/Sensitivity (con’t)  Formula – Simple DCF | Carmen Quiz (in-class) |
| 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  Library Datasets |  |
| 9 | Bloomberg Introduction & Navigation  Bloomberg Functionality: News & Industry |  |
| 10 | Bloomberg Functionality: Equity  Bloomberg Functionality: Fixed Income |  |
| 11 | Industry & Company Analysis Project Presentations  Investing & Fund Analysis | Industry & Company Analysis Project Due |
| 12 | Morningstar & Bloomberg Portfolio Analytics  Capital IQ | BMC Due |
| 13 | 401K Project Presentations  Bloomberg Functionality: FX & Commodities  Bloomberg Excel Formulas & Refinitiv Eikon | 401K Project Due |
| 14 | 4/16 & 4/18 Final Project Presentations | Final Project Due |

**Grading:**

|  |  |
| --- | --- |
| Bloomberg Market Concepts & Individual Market Data Assignments | 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% |

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

**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:** assessunderstanding 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](https://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](https://go.osu.edu/coam) (go.osu.edu/coam)
* [Ten Suggestions for Preserving Academic Integrity](https://go.osu.edu/ten-suggestions)(go.osu.edu/ten-suggestions)
* [Eight Cardinal Rules of Academic Integrity](https://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](http://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:+8002738255). [The Ohio State Wellness app](https://go.osu.edu/wellnessapp)

**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)](https://slds.osu.edu/). 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](tel:+6142923307)
* Website: [slds.osu.edu](https://slds.osu.edu/)
* Email: [slds@osu.edu](mailto:slds@osu.edu)
* In person: [Baker Hall 098, 113 W. 12th Avenue](http://www.osu.edu/map/building.php?building=095)

**Student COVID-related Accommodation Process:**

The university strives to maintain a healthy and accessible environment to support student learning in and out of the classroom.  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.  After registration, make arrangements with me as soon as possible to discuss your accommodations so that they may be implemented in a timely fashion.

If you are isolating while waiting for a COVID-19 test result, please let me know immediately. Those testing positive for COVID-19 should refer to the [Safe and Healthy Buckeyes site](https://safeandhealthy.osu.edu/tracing-isolation-quarantine) for resources.  Beyond five days of the required COVID-19 isolation period, I may rely on Student Life Disability Services to establish further reasonable accommodations. You can connect with them at [slds@osu.edu](mailto:slds@osu.edu); 614-292-3307; or [slds.osu.edu](https://slds.osu.edu/).

**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](https://go.osu.edu/credithours) (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.

**Religious accommodations**

Our inclusive environment allows for religious expression. Students requesting accommodations based on faith, religious or a spiritual belief system in regard to examinations, other academic requirements or absences, are required to provide the instructor with written notice of specific dates for which the student requests alternative accommodations at the earliest possible date. For more information about religious accommodations at Ohio State, visit [odi.osu.edu/religious-accommodations](https://click.t.osu.edu/?qs=5752de7470b567c785fa816b36fe287009a142751d127f1eeea7760e1722c902e28c0b5e0fe7df3fda066e441cb637c4dba40f6cc3ba289f).

**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.