Instructions:
This assignment is designed to give you overview of the financial status of your firm and its performance relative to a set of comparable firms. It will also serve as an introduction to Bloomberg. The assignment is due on Monday, November 5th and includes two components, as described below:

1. Using Bloomberg, complete the data items on pages 2 and 3. In each section, I have listed the Bloomberg function that can be used to access the required information.

2. Using Bloomberg or your own calculations, complete the comparable firm analysis on page 4. This analysis incorporates information for your firm, for a broad set of comparable firms, and for the three firms you view as the key comparable firms.
**Bloomberg Information Collection:**
Using the Bloomberg functions listed below, fill in each of the firm characteristics.

Company Name: __________________________________________________

General Information from Equity Description (DES) page 1:

- Current Price ____________________________
- Current P/E Ratio ________________________
- Dividend Yld. ____________________________
- One-year Return __________________________
- Shares Outstanding _______________________
- Market Capitalization ____________________
- Beta relative to S&P ______________________

Ownership Information from Equity Description (DES) page 2 or Ownership Summary (OWN) function:

- Instl. Ownership (%) _____________________
- Inside Ownership (%) ____________________

Institutional Owners from Equity Description (DES) page 2 or Equity Holders (HDS) function:

- Top three institutional owners (and % owned) (1) _____________________________
- (2) _____________________________ (3) _____________________________

Earnings Estimates from Equity EE Z function:

- Mean quarterly earnings estimate (next QTR) ______________
- Mean annual earnings estimate (next FY) ______________
- Mean 5-year growth forecast ________________________

Analyst Recommendations from Equity ANR function:

- Number of buys/holds/sells ______________
- Consensus rating ________________________
Long-term Credit Ratings from Equity CRPR function:

Moody’s Rating ________________________ S&P Rating ________________________________

Fitch Rating __________________________

Debt Description from Equity DDIS screen:

Lowest debt maturity (years) _______________ Highest debt maturity (years) _______________

Debt ($) at lowest maturity ________________ Debt ($) at highest maturity ________________

Total debt amount ________________ Number of debt issues ________________

Beta Calculations from Equity BETA screen:

Beta relative to the S&P based on 2 years/weekly returns: Raw Beta __________________________

Adjusted Beta __________________________

Beta relative to the S&P based on 5 years/monthly returns: Raw Beta __________________________

Adjusted Beta __________________________
**Comparable Firm Analysis:**
Using Bloomberg or your own calculations, fill in the data below. The first three comparable firms are the three firms you identify as the most closely matched comparable firms. The comparable firm average should be based on a broader set of comparable firms. Please list the names of the three key comparable firms you have selected and briefly describe your method for selecting comparable firms. Attach any necessary calculations or spreadsheets.

<table>
<thead>
<tr>
<th>Firm Name:</th>
<th>Your Firm</th>
<th>Comparable Firm #1</th>
<th>Comparable Firm #2</th>
<th>Comparable Firm #3</th>
<th>Comparable Firm Average</th>
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<td>Net Income Growth</td>
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Description of comparable firm selection:

Notes:
Financial characteristics and ratios for an individual firm can be identified using the Financial Analysis (FA) screen in Bloomberg. Comparable firm analysis can be done using the Relative Valuation (RV) screen in Bloomberg. These analyses can also be done using Mergent, Capital IQ, or many financial sites available on the web. To change the variables selected for display within the RV screen, choose *Custom* and *Add Columns*. If you wish to change the set of comparable firms, either click *Comp Source-Custom Comps* or click on *Edit Comparables* at the bottom of the page, add or remove firms, and click *Save*. 