

Data analytics and visualization in financial statement analysis

UGRA_014155

Departments	Department of Economics, Finance & Accounting
Teaching Languages	English
ECTS	2
Teacher responsible	Platikanova Petya - petya.platikanova@esade.edu

Prerequisites

Basic level: financial accounting and analysis.

Python programming: recommendable but not required.

Teaching methodology

The course is organized around different topics related to the tools in financial analysis and the visualization of the most valuable outputs for more effective communication using financial information.

The course content refers to real business examples, which will be comprehensively examine, analyzed and visualized using popular visualization techniques.

Description

Short description

1. Introduction

Visualization has reached the mainstream consciousness in professional and commercial contexts. An increasing number of professionals and organizations, across all industry types and sizes, are embracing the importance of getting more value from their data and doing more with it, for both internal and external benefit.

In this course, we will revise, reflect, and refine your skill and understanding about the challenges of working with data, both analysis and visualization, through practical exercises and real-world examples.

The course will be useful for those of you who want to improve data analytical skills using financial information and communicate more effectively in the field of finance. We will examine practical cases from the world of financial analysis, but your expanded knowledge and learning will help you reinforce your message outside this field.

2. Course objectives

The objective of this course is expand your knowledge and reinforce your learning about working with data by using different resources.

We will revise, reflect, and refine your skill and understanding about the challenges of working with data through practical exercises.

We will challenge your existing approaches to creating and consuming visualizations, examine effective or ineffective visualization, and encourage you to have a more structured approach to data visualization.

The course will increase your awareness of the possible approaches to visualizing data and hopefully help you become an informed user of data visualizations available in social media, press reports, etc. and often

Content

#	Topic
1	Introduction to data visualization in financial statement analysis.
2	Discuss the new trends in data visualization. Practice financial analysis (ratio analysis) and data visualization.
3	Reorganization. Financial analysis in decision-making - revisions in corporate decisions and their effect on financial indicators. Data visualization of KPIs
4	Python resources in financial analysis

Assessment

Tool	Assessment tool	Category	Weight %
Other	Class activities	Retake and ordinary round	30.00%
Group project	Group Project	Retake and ordinary round	70.00%

PROGRAMS

- B13-Exchange Program Bachelor of Business Administration (BBA) (Undergraduates: Business)
 - B13 Year 1 (Optative)
- B13S-Exchange Program Bachelor of Business Administration (BBA) (Undergraduates: Business)
 - B13S Year 1 (Optative)
- BBA20-Bachelor of Business Administration (BBA) (Undergraduates: Business)
 - BBA20 Year 3 (Optative)
 - BBA20 Year 4 (Optative)
- BBE20-Bachelor of Business Administration (BBA) (Undergraduates: Business)
 - BBE20 Year 4 (Optative)
 - BBE20 Year 3 (Optative)
- BITLASI22-Bachelor in Transformational Leadership and Social Impact (Undergraduates: Business)
 - BITLASI22 Year 4 (Optative)
- ECOL21-European Common Online Learning (Undergraduates: Business)
 - ECOL21 Year 1 (Optative)
- GBD20-Double Degree in Business Administration and Law (Undergraduates: Law)
 - GBD20 Year 3 (Optative)
 - GBD20 Year 1 (Optative)
 - GBD20 Year 4 (Optative)
 - GBD20 Year 2 (Optative)