WELCOME!

While we’re waiting, please use the chat to share your experience with the last case competition.

Did you find it challenging? Easy? Any surprises? We’d love to hear!
Valuation Research

MMPA 2021 Case Competition #2

Helen Kula & Catherine Fournier-Boulianne
Li Koon Chun Finance Learning Centre, UTM Library
June 22, 2020
Introductions

Catherine Fournier-Boulianne
IMI Liaison Librarian

Helen Kula
Head, IMI Library Services & Instruction

Maria Ruiz
IMI Reference & Research Specialist
Agenda

• Company comps
  • What they are
  • How to find them using FactSet and Bloomberg

• Deal comps
  • What they are
  • How to find them using FactSet

• Valuation templates
  • Available with FactSet’s Excel ad—in

• Q & A
Session logistics

- Attendance
- Resources
  - Slides
  - Online research guide
- Workshop will be 75 minutes long, including Q&A
  - Will pause periodically for questions - live or via chat
  - Chat will be monitored by Maria
- Session will be recorded
  - Video, transcript, chat export will be all uploaded to Quercus
Session logistics contd.

• During demos of FactSet, you are welcome to follow along but 1-on-1 trouble-shooting or assistance will not be available during the session
  • **Bloomberg** has already been reserved for the presenters to use during both workshops this afternoon so **this database will not be available to you from 1-4pm today**

• If there are unanswered questions at the end of our session, we will either post responses to Quercus or you are welcome to email **utm.lkcflic@utoronto.ca**
Session logistics contd.

• If you are unclear how to access FactSet or Bloomberg, information about how to access these are included in these pages in the online research guide:
  
• https://guides.library.utoronto.ca/MMPA_CASECOMP/factset
• https://guides.library.utoronto.ca/MMPA_CASECOMP/bloomberg

• Reminder to mute your microphone unless you are speaking
Poll

• Please answer the Zoom poll about your use of FLC or library resources when conducting research during the last case competition

• *Poll is anonymous!*
Approaches to valuation

https://guides.library.utoronto.ca/MMPA_CASECOMP/valuation
Company comps

Q: What is a comp?

*Please answer in the chat or put up your hand to speak.*
Company comps

https://guides.library.utoronto.ca/MMPA_CASECOMP/company_comps
Company comps

• FactSet
  https://my.factset.com
Questions?

*Please answer in the chat or put up your hand to speak.*
Company comps

• Bloomberg
Questions?

Please answer in the chat or put up your hand to speak.
Deal comps

• https://guides.library.utoronto.ca/MMPA_CASECOMP/deal_comp

• FactSet
  https://my.factset.com
Questions?

*Please answer in the chat or put up your hand to speak.*
Templates

• FactSet offers an Excel add-in that can be used to streamline financial modelling and analysis
  • *Only available to those who have downloaded the version of FactSet for PCs (FactSet Workstation)*

• FactSet’s Template Library include those for:
  • DCF Analysis
  • WACC Analysis
Questions?

*Please answer in the chat or put up your hand to speak.*
Next steps & help

• Before the case competition, make sure:
  • you have an active account for FactSet that you have tested
  • your team has at least one member with access to the Excel plug-in
  • you or a team member have an active Bloomberg account
  • your team has explored most of the resources listed on the guide

• Help is available:
  • The online research guide (screenshots and a video for FactSet & Bloomberg)
  • Workshop video and video/chat transcripts
  • In-person consultations and training – just ask!
Connect with us

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ON VACATION
June 29 – July 10
Thank you and ....

Good Luck!