UNIVERSITY OF ECONOMICS - VARNA

FACULTY OF „BUSINESS"

DEPARTMENT „INDUSTRIAL BUSINESS"

ACCEPTED BY:

Rector:

(Prof. Dr. Plamen Iliev)

SYLLABUS

SUBJECT: " FINANCIAL AND BUSINESS ANALYSIS ";

DEGREE PROGRAMME: „Business and Management"; BACHELOR`S DEGREE

YEAR OF STUDY: 4; SEMESTER: 8;

TOTAL STUDENT WORKLOAD: 150 h.; incl. curricular 75 h.

CREDITS: 5

DISTRIBUTION OF WORKLOAD ACCORDING TO THE CURRICULUM

TYPE OF STUDY HOURSE	WORKLOAD, h.	TEACHING HOURS PER WEEK, h
CURRICULAR: incl.		
• LECTURES	45	3
• SEMINARS (lab. exercises)	30	2
EXTRACURRICULAR	75	-

Prepared by:

1. …………………………………..
   (Assc.prof. Y. Ivanov, PhD)

2. …………………………………
   (Chief.assist.prof.M. Bliznakov, PhD)

Head of department: …………………………………..
„Industrial Business"   (Assoc.prof. I. Minkov, PhD)

I. ANNOTATION

The course introduces knowledge and skills in the field of financial and business analysis, which will help of the students to make proper decision in the dynamic economic environment. The discipline includes both classical analysis methods and new tools, some modern software solutions for financial and business analysis. The mean goal of this course is to focus on the contemporary challenges facing business organizations, and help to the students to make decisions and take action in real time. The basic knowledge to be acquired after passing the training course is related with:

- Set of sources of analysis information;
- Identifying the analysis needs in the organization;
- Knowledge of various financial and business analysis techniques;
- Knowledge of making managerial decisions.

After completing the training course, students will acquire the skills to:

-Gathering data and interpreting it in information for analysis purposes;
- conducting independent analysis in business organization;
- making proposals and decisions based on the results of the analysis;
-Communication of the results of the analysis with the different stakeholders.

During the training course will used modern training methods, and the new knowledge will be based on courses from the entire studding period.

II. THEMATIC CONTENT

No. по ред	TITLE OF UNIT AND SUBTOPICS	NUMBER OF HOURS		
		L	S	L.E.
1	**Fundamental Concepts for Financial and Business Analysis**	3	1	
1.1	Introduction to business analysis.			
1.2	Key terms: strategy, competition, analysis.			
1.3	The needs of financial and business analysis			
1.4	Decision making			
1.5	Data and Information			
1.6	Sources, Collecting, Sampling of Data			
2	**Exploring Data**	5	2	
2.1	Storing, Structuring, and Organization			
2.2	Frequency Distribution			
2.3	Percentiles			
2.4	Fundamental Concepts			
2.5	Measures of Location			
3	**Measuring and Evaluating Variation of Data**	5	2	
3.1	Percentage Change			
3.2	Weighted Index Numbers			
3.3	Deflating Time Series			
4	**Association Between Variables**	5	2	
4.1	Correlation Analysis			
4.2	Scatter Plot			
4.3	Regression Analysis			
4.4	The Coefficient of Determination			

5	**Time Series and Forecasting**	**3**	**2**
5.1	Time Series Components		
5.2	Evaluation and Comparison of Models		
6	**Classic business analysis models**	**4**	**3**
6.1.	SWOT – analysis		
6.2.	Business model analysis		
6.3.	Critical success factors analysis		
6.4.	Product line analysis		
6.5.	Scenario analysis		
6.6.	Win/Lose analysis		
6.7.	McKinsy 7S analysis		
7	**Modern business analysis models**	**4**	**3**
7.1.	Benchmarking analysis		
7.2.	SERVO analysis		
7.3.	Strategic Relationships analysis		
7.4.	Technology Forecasting		
8	**Financial Modeling**	**4**	**3**
8.1	Costs, Revenue, Profit and Contribution		
8.2	Non-linear relationships		
8.3	Graphical Illustration of Models		
9	**Financial Analysis**	**3**	**3**
9.1	Liquidity analysis		
9.2	Analysis of economic activity		
9.3	Debt analysis		
9.4	Profitability analysis		
9.5	DuPont system		
10	**Leverage analysis**	**3**	**3**
10.1	Operational Leverage		
10.2	Financial Leverage		
10.3	Total Leverage		
11	**Break-even Analysis**	**3**	**3**
11.1	Operational break-even		
11.2	Financial beak-even		
11.3	Total break-even		
12	**Company Valuation**	**3**	**3**
12.1	DCF Methods		
12.2	Net Asset Value		
12.3	Market Ratios Method		
	Total:	**45**	**30**

III. FORMS OF CONTROL:

No. by row	TYPE AND FORM OF CONTROL	№	extracurricular, h.

1.	**Midterm control**		
1.1.	Test 1	**1**	**20**
1.2.	Test 2	**1**	**25**
1.3.			
1.4.			
	Total midterm control:	**2**	**45**
2.	**Final term control**		
2.1.	Examination (test)	**1**	**30**
	Total final term control:	**1**	**30**
	Total for all types of control:	**3**	**75**

IV. <u>LITERATURE</u>

REQUIRED (BASIC) LITERATURE:
1. Shukumar, A., L.Tipi, J.Revil, Applied business analysis, eBook, 2016.

RECOMMENDED (ADDITIONAL) LITERATURE:

1. Fleisher, C., B.Bensoussan, Business and Competitive analysis. Efectiv application of new and classic methods, 2d ed., Pearson education, USA, 2015