COURSE SYLLABUS

# Excel, Finance, & Investing Summer Program Live Online (High School & College)

Learn Microsoft Excel, finance, and stock market investing in this interactive, live online summer course for high school students.

Group classes (Live Online) and onsite training are available for this course. For more information, email corporate@nobledesktop.com or visit: https://www.nobledesktop.com/classes/excel-finance-investing-summer-bootcamp



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# Course Outline

## Excel for Business Fundamentals

### Introduction

- Interface
- Data Entry

### Formulas

- Autofill
- Calculations
- True or False
- AutoSum Functions
- Text Functions
- Multi-Input Functions
- Absolute Cell References

### Formatting

- Formatting
- Format Painter
- Conditional Format

### Charts & Tables

- Line Chart
- Column Chart
- Pie Chart

- Tables

### Workbook Management

- Printing
- Worksheets
- Repeat Action
- Shortcuts

### End of Class Project

- Using Formulas to Analyze Financial Data
- Save and Close

## Intermediate Excel for Business

### Worksheet Management

- Navigation
- Paste Special

### Working with Text

- Splitting Text
- Joining Text
- Named Ranges
- Data Validation
- Sort & Filter
- Remove Duplicates

### Database Functions

- VLOOKUP
- HLOOKUP
- VLOOKUP - Closest Match

### Logical Functions

- AND, OR
- IF statements

### Pivot Tables

- Pivot Tables
- Pivot Tables & Grouping
- Multiple Pivot Tables

### Statistical Functions

- Ranking
- COUNTIFS
- SUMIFS

### Advanced Charts

- Combo Charts
- Use Charts & Functions to Build a Financial Summary Excel Sheet

## Advanced Excel for Finance

### Excel for Financial Modeling

- Advanced techniques to Expedite Workflow
- Advanced Analytical Tools & Sensitivity Analysis
- Database Functions for Finance
- Functions for Financial Analysis

## Stock Market Fundamentals

### Introduction to Stocks

- Stock Fundamentals
- Stock indices
- Liquidity
- Dividend Yields
- Exchange Traded Funds (ETFs)

### Intermediate Stock Topics

- Market Capitalization
- P/E Ratios
- EV/EBITDA Multiples
- Stock Movement
- Earnings Release
- Interest Rates
- Economic Trends

### Bond Investing + Stock Options

- Types of Bonds
- Bond Pricing, Yields, and Spread
- Credit Ratings & Risks
- Call & Put Options
- Option Strategies & Hedging

## Foundational Accounting Topics

### Intro to Accounting

- Financial Reports
- Types of Financial Statements
- GAAP
- Cash vs. Accrual Accounting

### Income Statement, Balance Sheet, and Cash Flow Statement

- Essential Line Items
- Profit Ratios & Margins
- Depreciation and Amortization
- EBITDA
- Assets = Liabilities + Stockholder's Equity

- Changes in PP&E
- Working Capital
- Cash flow from Investing, Financing, and Operations
- Indirect Method

## Corporate Finance & Financial Modeling

### Introduction to Corporate Finance

- Enterprise value
- Financial Accounting & Statement Analysis
- Three Statement Model
- Intro to DCF Modeling
- Sensitivity Analysis

### Company Analysis

- Discuss the business model and value drivers of a public restaurant company
- Capital Structure: Calculate the total enterprise value and build a capital structure table
- Ratios: Calculate the financial ratios
- Decide if this is a good or bad investment