

UNIVERSITY OF ECONOMICS - VARNA
FACULTY OF BUSINESS
DEPARTMENT INDUSTRIAL BUSINESS AND LOGISTICS

Adopted by the FC (record №/ date):
Adopted by the DC (record №6/27.02.2020):

ACCEPTED BY:
Dean:
(assoc.prof. Dr. Denka Zlateva)

SYLLABUS

SUBJECT: FINANCIAL AND BUSINESS ANALYSIS

DEGREE PROGRAMME: Business Management; BACHELOR'S DEGREE

YEAR OF STUDY: 4; SEMESTER: 8;

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

CREDITS: 5

DISTRIBUTION OF WORKLOAD ACCORDING TO THE CURRICULUM

<i>TYPE OF STUDY HOURSE</i>	<i>WORKLOAD, h.</i>	<i>TEACHING HOURS PER WEEK, h</i>
CURRICULAR: incl. - LECTURES - SEMINARS / LAB. EXERCISES	45 30	3 2
EXTRACURRICULAR	75	-

Prepared by:

1.
(assoc.prof. Dr. J. Ivanov)
2.
(chief ass.prof. Dr. M. Bliznakov)

Head of department:
„Industrial Business and Logistics“ (assoc.prof. Dr.Jordan Ivanov)

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 main 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 studying period.

II. THEMATIC CONTENT

No.	TITLE OF UNIT AND SUBTOPICS	NUMBER OF HOURS		
		L	S	L.E.
THEME 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			
THEME 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			
THEME 3. MEASURING AND EVALUATING VARIATION OF DATA		5	2	
3.1	Percentage Change		-	
3.2	Weighted Index Numbers			
3.3	Deflating Time Series			
THEME 4. ASSOCIATION BETWEEN VARIABLES		5	2	
4.1	Correlation Analysis			
4.2	Scatter Plot			
4.3	Regression Analysis			
4.4	The Coefficient of Determination			
THEME 5. TIME SERIES AND FORECASTING		3	2	
5.1	Time Series Components			

5.2	Evaluation and Comparison of Models			
THEME 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			
THEME 7. MODERN BUSINESS ANALYSIS MODELS		4	3	
7.1.	Benchmarking analysis			
7.2.	SERVO analysis			
7.3.	Strategic Relationships analysis			
7.4.	Technology Forecasting			
THEME 8. FINANCIAL MODELING		4	3	
8.1	Costs, Revenue, Profit and Contribution			
8.2	Non-linear relationships			
8.3	Graphical Illustration of Models			
THEME 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			
THEME 10. LEVERAGE ANALYSIS		3	3	
10.1	Operational Leverage			
10.2	Financial Leverage			
10.3	Total Leverage			
THEME 11. BREAK-EVEN ANALYSIS		3	3	
11.1	Operational break-even			
11.2	Financial beak-even			
11.3	Total break-even			
THEME 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.	TYPE AND FORM OF CONTROL	Number	extra-curricular, hours
1.	Midterm control		
1.1.	Interim Test #1	1	25
1.2.	Interim Test #2	1	20
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. LITERATURE

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