Capstone: A fair comparison of ___ and ___

Name: _____ Class: _____ Date: _____

You will write a fair comparison of two companies: when each year ran, how much came in, where each $100 went, and one thing that makes a straight comparison tricky. Every number needs its filing and its period.

What to do

1. Choose one pair from the cards below (not the worked example).
2. Fill in the research log on your worksheet from the card.
3. Find one more fact in one company's 10-K (links on each card), for example what a line that does not match includes.
4. Make a one-page write-up, a poster or a 3-slide talk, using the template.

Part A: Research log

Write each fact and its source: the card, or the filing with its section.

My pair: _____ and _____

1. Periods. Company 1: FY_____, from _____ to _____. Company 2: FY_____, from _____ to _____.

2. Size. Revenue $_____ and $_____; net income $_____ and $_____. Source: _____

3. Receipts. Kept per $100: $_____ and $_____. Largest cost: _____ ($_____) and _____ ($_____). Source: _____

4. The check. What stops a straight comparison: _____

5. One more fact from a 10-K: _____ Company and section: _____

Part B: Template

A fair comparison of _____ and _____ (years ended _____ and _____)

1. When. ____'s FY____ ran from _____ to _____; ____'s FY____ ran from _____ to _____.

2. How much came in. ____ reported $_____ of revenue and $_____ of net income in FY____; ____ reported $_____ and $_____ in FY____. Source: _____

3. Where each $100 went. ____ kept $_____ and spent most on _____; ____ kept $_____ and spent most on _____. Source: _____

4. The check. A straight comparison is tricky because

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5. One more fact. "_____" (company, filing, section)

1. **6. Summary.** Two sentences that name both companies, their numbers and their periods, with no verdict.

_____

_____

_____

2. **Sources.** List each filing (company, form, date filed) and the card you used.

_____

_____

Part C: Self-check before you hand it in

☐ Every number has its fiscal year or date next to it.

☐ Every fact names its source: the card, or the filing with its section.

☐ I said where the two years end in different months or carry different labels.

☐ I checked that the lines I set side by side measure the same thing.

☐ I did not say either company is ahead, and I said nothing about their shares.

☐ A classmate could explain how the two companies differ after reading this.

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Exit ticket · Day 2 or Day 3.

Name: _____ Class: _____ Date: _____

Part D: Exit ticket

1. In one sentence, compare your two companies' revenue, with both periods.

2. Name one check you made before comparing your pair.

3. Why are two banks compared with different measures from two retailers?

4. Rewrite this sentence so it only describes: "Coca-Cola is way more profitable than PepsiCo."

5. Rewrite this sentence so it names both periods: "Apple made less than Microsoft last year."

Word bank

Fiscal year	The 12 months (or 52 or 53 weeks) a company uses for its yearly results.
Revenue	Money that came in from sales. Banks report it after the interest they pay.
Net income	What was left after all costs and taxes.
$100 receipt	Where each $100 that came in went, worked out from the income statement.
Verdict	A judgment that one side is ahead. A fair comparison leaves it out.

Sentence starters

- ____'s FY____ ran from ____ to ____; ____'s FY____ ran from ____ to ____.

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- ____ reported ____ of revenue in ____, and ____ reported ____ in ____.
- A straight comparison is tricky because ____.

student page

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