


Student: \_\_\_\_\_

## Rubric: Principles of Finance

Evaluate student proficiency in applying the principles of finance for cases and projects.

<b>Finance</b>			
	<b>Unacceptable 1 pts</b>	<b>Acceptable 5 pts</b>	<b>Exceptional 10 pts</b>
			
<b>Quantitative problems 20 %</b>			
<b>i.</b> Work applies principles of finance correctly to quantitative analysis.	<b>Unacceptable</b> Frequent errors or unacceptable mistakes indicative of a lack of understanding of core principle(s).	<b>Acceptable</b> Some errors, but demonstrates understanding of principles.	<b>Exceptional</b> No major errors and any minor errors do not violate principles.
<b>Conceptual problems 20 %</b>			
<b>i.</b> Work applies principles of finance correctly in discussing results, conclusions, and/or recommendations.	<b>Unacceptable</b> Write-up/Discussion reflects lack of basic understanding of principles.	<b>Acceptable</b> Write-up/discussion reflects basic understanding, but not deep understanding of principals.	<b>Exceptional</b> Write-up/discussion reflects a deep understanding of principals.
<b>Financial technology 20 %</b>			
<b>i.</b> Work uses appropriate financial technology to gather information and conduct financial analysis.	<b>Unacceptable</b> Spreadsheet, data sources, and/or financial software is misused or used inappropriately.	<b>Acceptable</b> Spreadsheet, data sources, and/or financial software used appropriately, but not masterfully.	<b>Exceptional</b> Spreadsheet, data sources, and/or financial software used masterfully.
<b>Analyze business situations 20 %</b>			
<b>i.</b> Work demonstrates ability to synthesize complex business situations down to key issues.	<b>Unacceptable</b> Focuses on tangential rather than key issues.	<b>Acceptable</b> Focuses on key issues but spends too much time on some tangential issues.	<b>Exceptional</b> Focuses on key issues and avoids or dismisses tangential issues
<b>ii.</b> Analysis is sufficient to reach reasonable conclusions and recommendations.	<b>Unacceptable</b> Quantitative and qualitative analysis too simplistic or convoluted.	<b>Acceptable</b> Quantitative and qualitative analysis is adequate to make reasonable conclusions and/or recommendations.	<b>Exceptional</b> Quantitative and qualitative analysis persuasively supports the recommendations and conclusions.

<b>iii.</b> Work makes convincing recommendations and draws sound conclusions.	<b>Unacceptable</b>  Conclusions and recommendations are wrong or implausible.	<b>Acceptable</b>  Conclusions and recommendations are reasonable and believable.	<b>Exceptional</b>  Conclusions and recommendations are convincing.
<b>Communicate financial analysis</b> <b>20 %</b>			
<b>i.</b> Writing demonstrates ability to clearly and accurately communicate complex financial analysis.	<b>Unacceptable</b>  Frequently misuses terms, misinterprets findings, and/or miscommunicates methods. Grammar and spelling errors are commonplace.	<b>Acceptable</b>  Makes a few minor errors in using terms, interpreting findings, and/or communicating methods. Contains a number of grammar and spelling errors.	<b>Exceptional</b>  Uses terms correctly. Clearly and accurately interprets findings and communicates methods. Contains few or no grammar and/or spelling errors.
<b>ii.</b> Oral presentation demonstrates ability to clearly and accurately communicate complex financial analysis.	<b>Unacceptable</b>  Frequently misuses terms, misinterprets findings, and/or miscommunicates methods.	<b>Acceptable</b>  Makes a few minor errors in using terms, interpreting findings, and/or communicating methods.	<b>Exceptional</b>  Uses terms correctly. Clearly and accurately interprets findings and communicates methods.

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**Rubric Code: G43BX6**