Université Paris II Panthéon ASSAS
Magistère Banque et Finance
2021/2022
MBF2

FINANCE PROJECT ON BLOOMBERG ©

PROFESSOR

Nathalie COLUMELLI, CFA graduated from ESSEC and was a fixed income trader for 16 years at ABN Amro, Société Générale and Deutsche Bank in London, Paris, and Frankfurt. In 2005, she founded Finance Training, a leading company specialized in CFA program training for investment professionals. With her team, she mentors financial professionals working for French banks, insurance companies and mutual funds. She was the Executive director of CFA Society France until May 2022 and has been an active volunteer for the association since then.

PRESENTATION

Understanding of today's markets is determined by the quality of information and tools one can access. Sound, rigorous market, company and industry analytics are the starting point. Bloomberg brings what is needed to examine fundamentals, assess relative value and understand corporate strategies in play. Getting insight into thousands of companies in more than 130 industries or understanding the driving forces behind the movements in major asset classes, credit metrics, economics, and government policy. The Bloomberg Terminal brings together all the data, news and analytics to provide a complete understanding of companies, industries and markets.

KEY CONCEPTS

Reference frame and scope: Capital Markets, Financial analysis departments, and Asset management

Key concepts: economics prevision, asset valuation, financial analysis and portfolio management

LEARNING OBJECTIVES AND CONTENT

The course objective is to increase the students' professionalism, familiarity, and fluency in using Bloomberg services and terminals.
Using Bloomberg as their sole Data provider, they will deliver a project of their choice (company analysis, credit analysis, portfolio return analysis, market prediction, technical analysis…) in small groups of 3-4 students.

METHOD AND SCHEDULE

Overall Hours = 12 hours - Location = Assas or Vaugirard (rooms to be determined)

6th October: 14H00-15H30 (1:30-hour class)
- – 1-hour presentation of the course + Q&A with Nathalie Columelli
- – Creation of a collaborative group on Slack
- – The students gather in groups of 3-4 students according to their preferences and profiles

15th October: 14H00-16H00 (2:00-hour workshop)
Students attend a Bloomberg presentation at Bloomberg Headquarters 7 rue Scribe in Paris. They use Bloomberg terminals and may follow-up by contacting the Bloomberg hotline for technical questions.
Contact for the workshop Thomas RAUSCH trausch4@bloomberg.net
Program: - company analysis - credit analysis - portfolio return analysis - market prediction - technical analysis - economics prevision - asset valuation - financial analysis and portfolio management

October (To be scheduled): 10h00-12H00: Bloomberg workshop by an MBF3 student
– Introduction on how to use the Bloomberg terminals
  o Slideshow shared with the group
  o MBF3 student answers questions about the Bloomberg terminal on Slack

2nd November: 15H00-17H30 (10 minutes per group)
– Each group validates a project with the professor (20 minutes per group) and provides a digital (pdf) summary of their project's goal (1 page)

8th December 14H00-19H00 (25 minutes per group)
– Each group presents his finalized project to the professor (25 minutes per group) conforming to the following schedule:
I. Description of the methodology employed and of the Bloomberg resources used (5 minutes)
II. Project analysis with conclusion/recommendation/… (20 minutes)
– Each group provides a digital (pdf) summary of the students' work (max 5 pages) conforming to the following outline:
I. Summary of the project's goal (1 page = November version slightly amended)
II. Description of the methodology employed, and the list of the Bloomberg resources/functions used (1 page)
III. Project analysis with conclusion/recommendation/… (3 pages)

GRADING

A minimum mark of 10/20 on this seminar is required to validate the course.
– Validation of project with the professor and digital summary of project's goal: 6 points.
– Presentation of the finalized project to the professor: Maximum score is 7 points. Poise: 4 points, use of multiple BBG resources: 3 points.
– Digital version: Maximum score is 7 points
No make-up exam will be organized for this seminar.

BIBLIOGRAPHY

Previous courses attended in asset valuation, financial analysis and portfolio management will be useful and applied.
Bloomberg will provide student guides.
The students will be provided digital guides including the following:
– Bloomberg User Guide (pdf)
– Getting started with Bloomberg (pdf)
– Bloomberg "Know More Do More" (pdf)
– Bloomberg Tutorials on https://www.youtube.com/user/Fintute/videos
– Bloomberg common functions (pdf)