



# Lesson 1: Intro and first steps



## Who I am?

- PhD in Finance from Svishtov – Thesis: “Improving Corporate Valuation Measurement in Bulgarian Stock Market”
- Published number of papers in the field stock market research
- Worked as Junior Analyst, BI Analyst, BI Lead & Senior BI Lead within Finance department of Experian LLC
- Current position: Analytics Manager at Experian Marketing Service doing market analytics
- Tools of choice: Tableau, Databricks, Python, SQL
- Research interests: stock market analytics, company valuations
- Hobbies: basketball, travelling, running



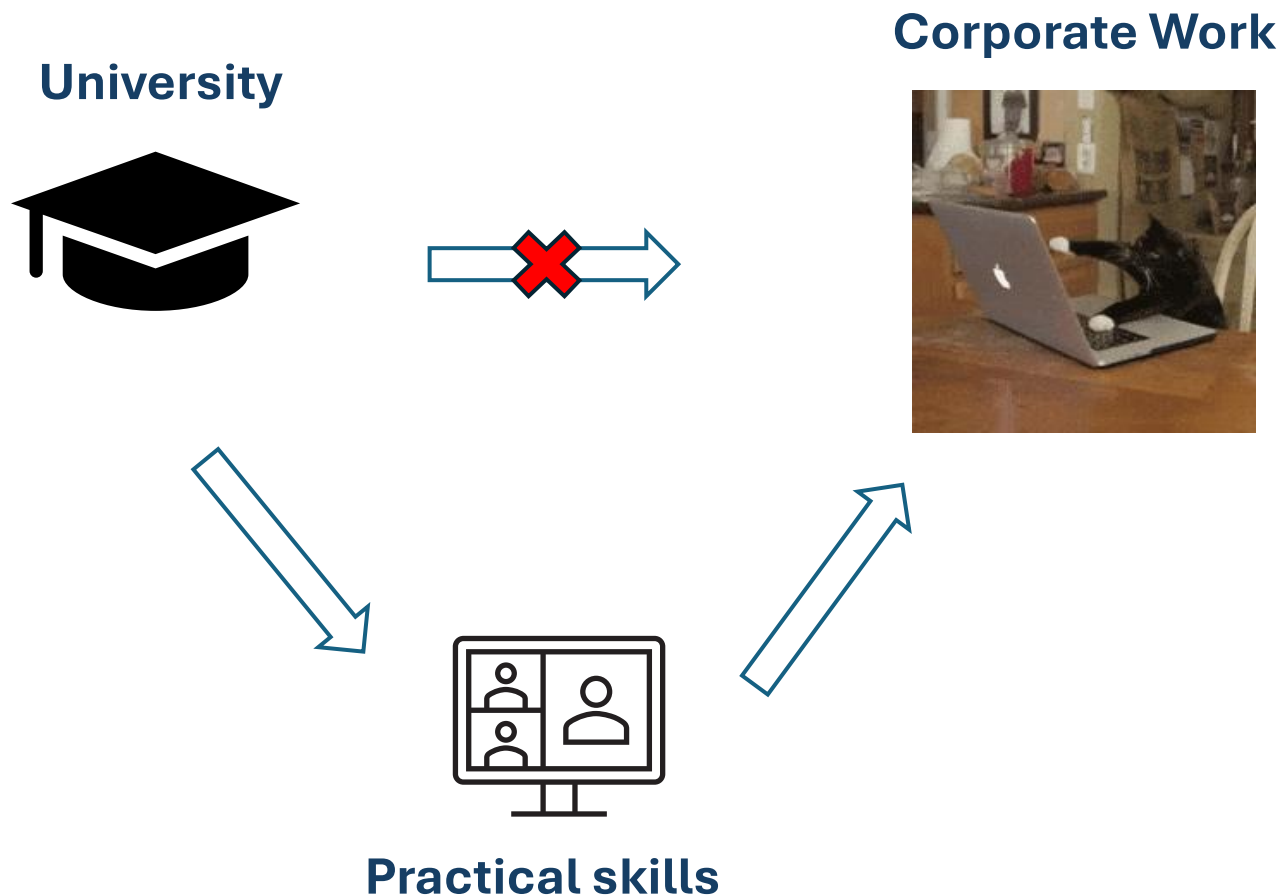
# Your Turn



## Where are your interests? (1-no interest, 5-love it)

| Name     | Coding (tech) | Data analytics | Corporate Finance | Stock Market |
|----------|---------------|----------------|-------------------|--------------|
| Kal      | 2             | 5              | 3                 | 5            |
| Plamen   |               |                |                   |              |
| Minh Dat |               |                |                   |              |
| Dannie   |               |                |                   |              |
| David    |               |                |                   |              |
| Emalyn   |               |                |                   |              |
| Jai      |               |                |                   |              |

# What we are doing here?

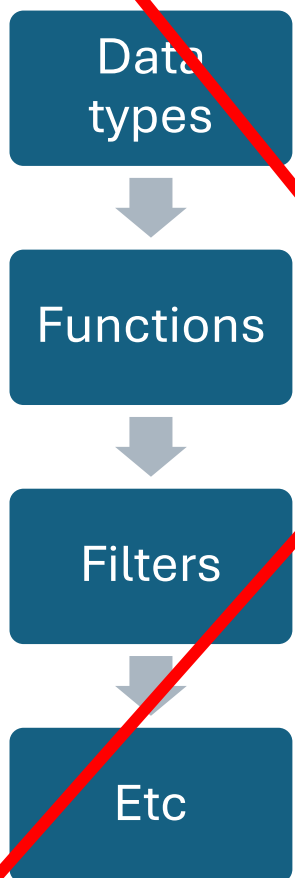


- University gives you base knowledge
- When you become “boss” then you will use this university knowledge
- To start you need practical skills
- What you will do will remind you to university days, but you won’t find a way to apply your knowledge
- In age of AI it is even harder to start

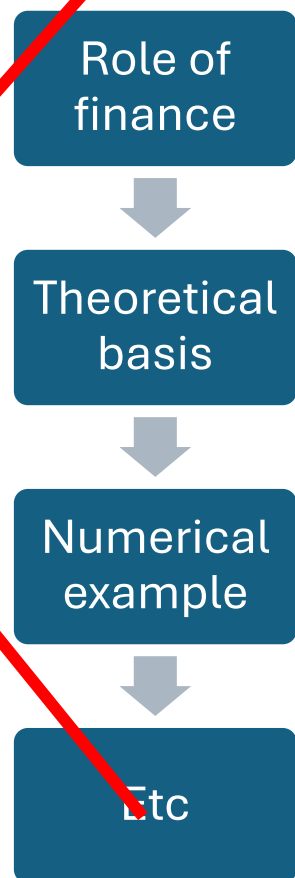
# What is different?



## Common way to teach coding/tech



## Common way to teach finance



Real job  
requires  
intersection

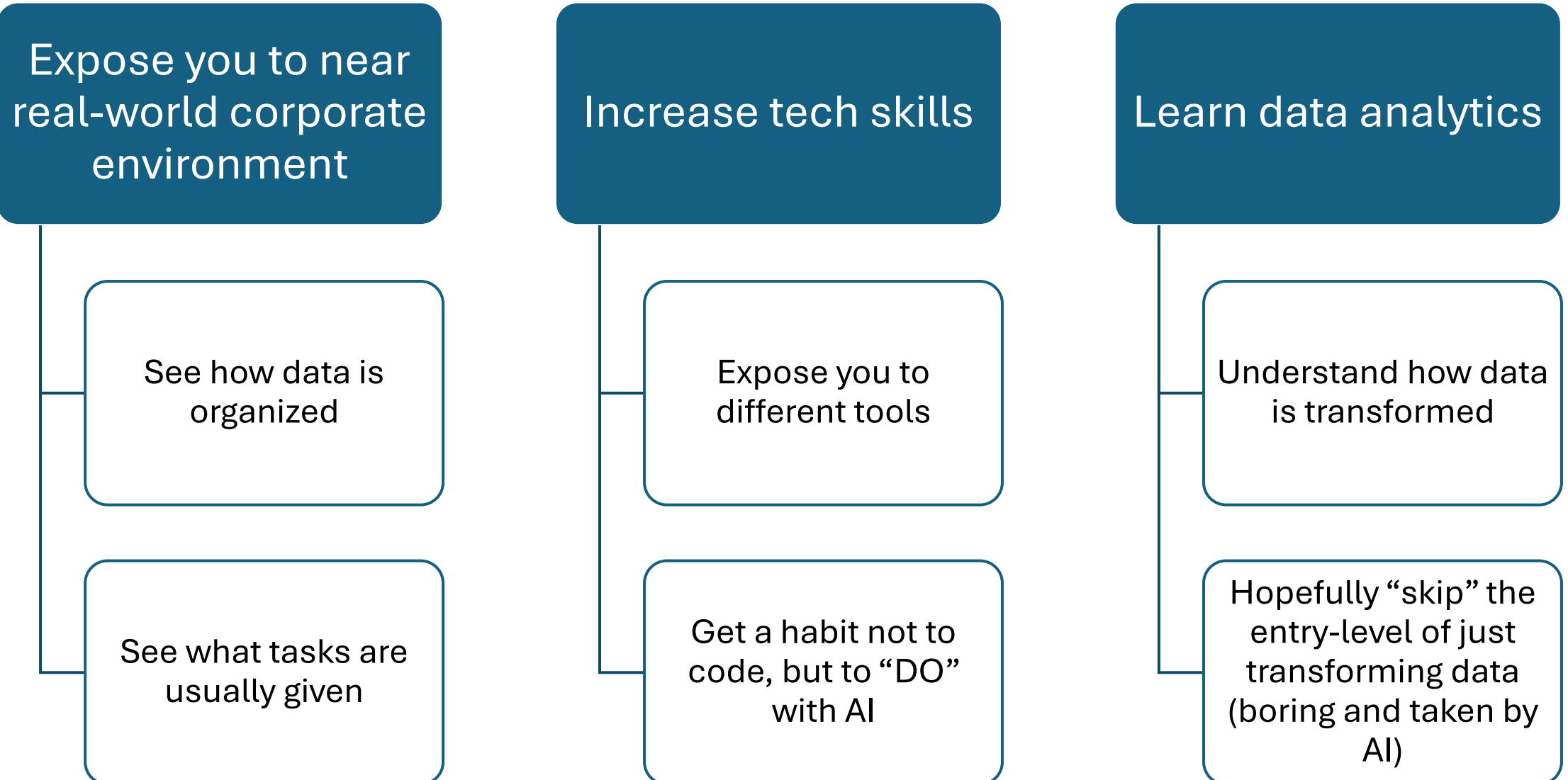
## Our way

Understand what is needed (no excess theory)

Use GenAI code it

Focus on analyzing the result

# Our goals



## Scenario you are thrown in



*You are starting as a “**Financial Analyst**” within the corporate department of “**XYZ**”*



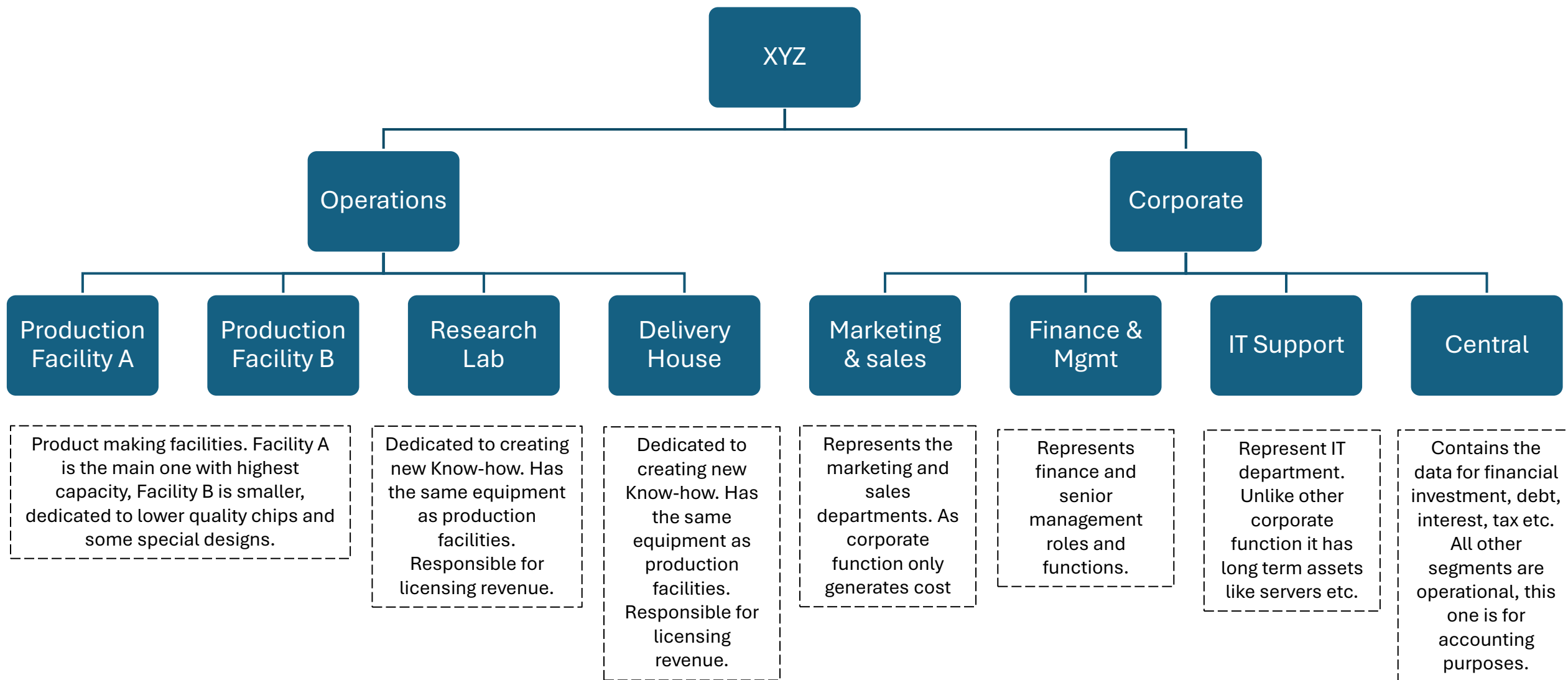
### Few facts on XYZ

- It is one of the biggest chipmakers in Taiwan that is growing extremely fast
- It is a private company
- XYZ uses Databricks environment to organize its corporate data

### What is your job

- Deliver analysis to senior management on various parts of the business
- Produce valuation of XYZ
- Since XYZ is going public, you will need to compile a pack to introduce the business to outside investors

# How is XYZ organized



# What is Databricks



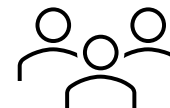
**databricks**



**Cloud-based  
platform**



**Helps store,  
clean and analyze  
large data sets**



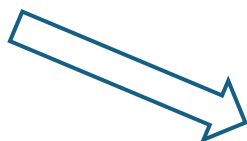
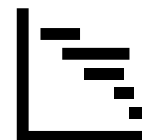
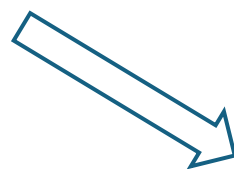
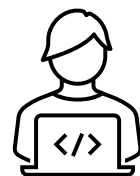
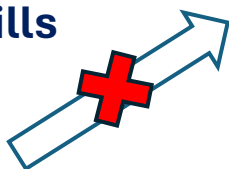
**Allows teams to  
collaborate in the  
same environment**



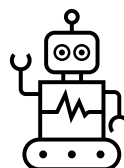
**Multiple coding  
tools available**



**No longer required  
to have advanced  
coding skills**



**AI can turn you  
knowledge into  
code**



- **Coding is getting replaced by AI**
- **You need to know what you are doing with the data rather than coding**
- **Focus on data analytics, this AI can't replace**

Explain  
what you  
are trying to  
do to GenAI



Get the  
code



Execute in  
Databricks



# Your profiles



# Lets go in Databricks

## Tasks to solve



Task 1: What is the total market size (revenue) in Current Year?

Task 2: What is the total market size (revenue) in Previous Year?

Task 3: What is the total market growth?

Task 4: Create pie chart to see breakdown of market by segment

Task 5: Estimate earnings per share for each company and display

Task 6: Plot EPS vs current year revenue



Task 1: Which is the fastest growing segment?

Task 2: What are top 5 fastest growing companies in each segment?

Task 3: How much the market share of the largest company has changed between the 2 years?