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Financial Modeling and Valuation Formulas

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List of 9 Financial Modeling and Valuation Formulas

Financial Modeling and Valuation

1) Fifo Cost of Goods Sold

$$fx \quad FCGS = LCGS - (ELR - BFR)$$

[Open Calculator !\[\]\(a870788d6ed9b8fd294b7654a8c8526b_img.jpg\)](#)

$$ex \quad 105 = 125 - (75 - 55)$$

2) Fifo Net Income

$$fx \quad FNI = LNI + \Delta LR \cdot (1 - T)$$

[Open Calculator !\[\]\(c50c8b7b2cc2cf9ff925edec0ee94c0d_img.jpg\)](#)

$$ex \quad 158.25 = 125 + 35 \cdot (1 - 0.05)$$

3) Fifo Retained Earnings

$$fx \quad FRE = LIFORE + LIFOR \cdot (1 - T)$$

[Open Calculator !\[\]\(f60b7a900783ac3fd531bfd9c111be6d_img.jpg\)](#)

$$ex \quad 95.75 = 15 + 85 \cdot (1 - 0.05)$$

4) Lifo Reserve

$$fx \quad LIFOR = FIV - LV$$

[Open Calculator !\[\]\(83bbbd261710c59db0214aa27b2edc0d_img.jpg\)](#)

$$ex \quad 85 = 195 - 110$$



5) Return on Common Equity

$$\text{fx } \text{RCE} = \frac{\text{NI} - \text{PD}}{\text{ACE}}$$

[Open Calculator !\[\]\(cbe80b694ebd74fcfe136a095b608235_img.jpg\)](#)

$$\text{ex } 2.052632 = \frac{1065 - 675}{190}$$

6) Segment Debt Ratio

$$\text{fx } \text{SDR} = \frac{\text{SL}}{\text{SA}}$$

[Open Calculator !\[\]\(3e2231b1ad3ca8da8658228c00dd08e0_img.jpg\)](#)

$$\text{ex } 0.8125 = \frac{130}{160}$$

7) Segment Margin

$$\text{fx } \text{SM} = \frac{\text{SP}}{\text{SR}}$$

[Open Calculator !\[\]\(0d5ec72f61334709c3fc9450209b754f_img.jpg\)](#)

$$\text{ex } 0.588235 = \frac{100}{170}$$

8) Segment Roa

$$\text{fx } \text{SROA} = \frac{\text{SP}}{\text{SA}}$$

[Open Calculator !\[\]\(b64b40baaee5acddc1eab8538ba84754_img.jpg\)](#)

$$\text{ex } 0.625 = \frac{100}{160}$$



9) Segment Turnover

[Open Calculator !\[\]\(dfbd6b3763a6d1d9afaa974f64e2e4b5_img.jpg\)](#)

$$\text{fx } St = \frac{SR}{SA}$$

$$\text{ex } 1.0625 = \frac{170}{160}$$



Variables Used

- **ACE** Average Common Equity
- **BFR** Beginning Lifo Reserve
- **ELR** Ending Lifo Reserve
- **FCGS** Fifo Cost of Goods Sold
- **FIV** Fifo Inventory Value
- **FNI** Fifo Net Income
- **FRE** Fifo Retained Earnings
- **LCGS** Lifo Cost of Goods Sold
- **LIFOR** Lifo Reserve
- **LIFORE** Lifo Retained Earnings
- **LNI** Lifo Net Income
- **LV** Lifo Inventory Value
- **NI** Net Income
- **PD** Preferred Dividends
- **RCE** Return on Common Equity
- **SA** Segment Assets
- **SDR** Segment Debt Ratio
- **SL** Segment Liabilities
- **SM** Segment Margin
- **SP** Segment Profit
- **SR** Segment Revenue
- **SROA** Segment Roa
- **St** Segment Turnover
- **T** Tax Saving



- **ΔLR** Change in Lifo Reserve



Constants, Functions, Measurements used



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