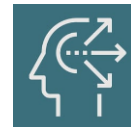


SWOT Analysis – Analyst Worksheet



Structured Strategic Intelligence Framework

Company Name:

[Enter company name here]

Analyst Name:

[Enter your name]

Date:

[YYYY-MM-DD]

Purpose Statement:

[Define the objective of this analysis, e.g., Investment thesis, Competitive benchmarking, M&A due diligence...]

Company Profile Snapshot



Company Name	<i>[Enter name]</i>	Ticker / Status	<i>[e.g., NYSE: AAPL or Private]</i>
Sector / Industry	<i>[Enter sector]</i>	Headquarters	<i>[City, Country]</i>
LTM Revenue	<i>[Enter revenue figure]</i>	Employees	<i>[Enter headcount]</i>

Core Business Description

[Briefly describe the company's primary products/services, target customer segments, and geographic footprint. What is their main value proposition?]

Key Public Data Sources Relied Upon

[List the primary sources framing this analysis, e.g., 2023 Annual Report, Q3 Earnings Call Transcript, recent SEC filings, specific industry reports...]



Public Data Sources Tracker



Source Category	Specific Document / URL	Date Accessed	Key Finding / Relevance to SWOT
Annual Report (10-K)	<i>[Link or document name]</i>	<i>[YYYY-MM-DD]</i>	<i>[What strategic priority or risk was identified?]</i>
Earnings Call Transcript			
News & Press Releases			
Regulatory Filings			
Customer/Employee Reviews			
Competitor Benchmarking			
Other (e.g., Patents)			

Strengths — Evidence Worksheet



Identify durable competitive advantages that competitors cannot easily replicate.

Strength 1	
Observation	<i>[e.g., Gross margin is 15% above peer average]</i>
Evidence Source	<i>[e.g., Q3 Earnings Presentation, Slide 12]</i>
Strategic Implication	<i>[e.g., High pricing power allows for continued R&D investment]</i>

Strength 2	
Observation	
Evidence Source	
Strategic Implication	

Strength 3	
Observation	
Evidence Source	
Strategic Implication	

Strength 4	
Observation	
Evidence Source	
Strategic Implication	

Strength 5	
Observation	
Evidence Source	
Strategic Implication	

Weaknesses — Evidence Worksheet



W1	
Observation	<i>[Describe the structural vulnerability]</i>
Evidence Source	<i>[e.g., Declining margins in Q3 10-Q]</i>
Strategic Implication	<i>[How does this limit their options?]</i>

W2	
Observation	<i>[Describe the structural vulnerability]</i>
Evidence Source	<i>[e.g., High employee turnover on Glassdoor]</i>
Strategic Implication	<i>[How does this limit their options?]</i>

W3	
Observation	<i>[Describe the structural vulnerability]</i>
Evidence Source	<i>[e.g., Customer concentration risk in Annual Report]</i>
Strategic Implication	<i>[How does this limit their options?]</i>

W4	
Observation	<i>[Describe the structural vulnerability]</i>
Evidence Source	<i>[e.g., Delayed product launches in press archives]</i>
Strategic Implication	<i>[How does this limit their options?]</i>

W5	
Observation	<i>[Describe the structural vulnerability]</i>
Evidence Source	<i>[e.g., Debt-to-equity ratio relative to peers]</i>
Strategic Implication	<i>[How does this limit their options?]</i>

Opportunities — Evidence Worksheet



Identify favourable external shifts: market growth, regulatory tailwinds, competitor missteps, technology adoption curves.

Opportunity 1		
OBSERVATION <i>[Describe the external opportunity]</i>	EVIDENCE SOURCE <i>[Where was this identified?]</i>	STRATEGIC IMPLICATION <i>[How can the company capture this?]</i>

Opportunity 2		
OBSERVATION	EVIDENCE SOURCE	STRATEGIC IMPLICATION

Opportunity 3		
OBSERVATION	EVIDENCE SOURCE	STRATEGIC IMPLICATION

Opportunity 4		
OBSERVATION	EVIDENCE SOURCE	STRATEGIC IMPLICATION

Opportunity 5		
OBSERVATION	EVIDENCE SOURCE	STRATEGIC IMPLICATION

Threats – Evidence Worksheet



Adverse external forces: new entrants, substitutes, macro headwinds, regulatory risk, geopolitical exposure

	Observation (What is the threat?)	Evidence Source	Strategic Implication
T1	<i>[Describe the external threat]</i>	<i>[Where did you find this?]</i>	<i>[How could this erode competitive position?]</i>
T2			
T3			
T4			
T5			

Analyst Scorecard & Final Assessment



Synthesise findings into a quantifiable assessment and actionable recommendation.

SWOT Dimension	Impact Score (1 = Low, 5 = High)	Primary Rationale
Strengths (Advantage)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<i>[Summarise the strength of the competitive moat]</i>
Weaknesses (Vulnerability)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<i>[Summarise the severity of internal gaps]</i>
Opportunities (Upside)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<i>[Summarise the potential for value creation]</i>
Threats (Risk)	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5	<i>[Summarise the probability and impact of external risks]</i>

Analyst Conviction Statement

[Write a 2-3 sentence thesis statement. Does this company have the strategic assets and market conditions to create durable value, and what are the critical risks to that thesis?]

Final Recommendation:

INVEST

MONITOR

AVOID

ENGAGE