

# How to write an effective financial performance summary?

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The financial performance of any company is vital for its future success. The analysts use it to determine the stability and viability of the business. Hence, it is very important to write an accurate and detailed financial performance summary. The document should be written in perfect English vocabulary as it is going to be used in presentations to higher management. It will be a good opportunity to impress your superiors with your excellent English writing abilities. Below are six tips to write an effective financial performance summary.



**The 6 tips:**

## **1. Starting Information**

At the beginning of your financial summary, include your company information. The information should include company details, the expertise and products, key members etc.. It can also include a mission statement and information about company values. This information should be checked for accuracy and care should be taken to make no spelling errors.

## **2. Past description**

A short and concise paragraph should be dedicated to the company's past performance. This is important for the analysts to gauge how the company performed in the past years. The section can also give a hint of the future projections of the company. The industry in which the company operates can also be described here including the projected economic forecast for the whole. Even though it is a description. Care should be taken not to exceed two pages at the maximum.

## **3. Graphs**

The heart of a financial summary is graphs and diagrams. Financial points just cannot be expressed in words and must be shown as part of diagrams so that it is easy for the audience to understand. The recipient should be able to decipher the ups and downs of the financial situation just by having a look at a bar diagram. They should be prepared meticulously and without mistakes.



#### 4. Sources

The sources of the information should be mentioned in a separate section. This section should be given so that accountability can be maintained. It also is a sure way to avoid plagiarism by giving qualified and credible sources. If it's your own research, mention that .

#### 5. Summary

Based on the information provided by graphs and sources, a brief summary of the information can be created. It should be a maximum of 200 words. This should be beneficial for people with no financial background. As this report is going to be read by many people with varied backgrounds, everyone should benefit from the information given.

#### 6. Versions

Create a basic purpose of your report for general information requests. However, make sure to adapt it as per the situation. The needs of the audience should fit with the purpose of the report. For example, if you are presenting your company to an audience of institutional investors, you can tailor the report focusing on the return, which they will generate over a period.



The above tips will help you to write an effective and persuasive summary. Utilize your [English language skills](#) to draft the best summary in order to convince the audience that your company is the best. Take the assistance of an [online English tutor](#) to get the right language in your report.

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**- By Monika Agarwal**

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