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### Solution Xend Inc Business

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#### Introduction

(First question) - Why semiconductors is an interesting industry for Daniel

An introduction to Entegris and its business

A look at the chemicals produced for computer chip manufacturing

A historical look at the importance of chemicals in chipmaking

The cost of chemicals within a chip

The backstory as to how Entegris started operating and their competitors

How the business has been able to remain so independent

The stickiness of the business and how they aim to be the partner of choice

A look at previous execution and any issues that have occurred in the past

The cyclical nature of the semiconductor industry historically

An overview Entegris' pricing power and maintaining margin profile

Operating leverage within the business and how the margin profiles differ between the different segments

A look at the business' research and development spend

How the business has approached mergers and acquisitions over the years

Whether the business has ever been a target acquisition for a larger player

The outlook for Entegris' revenue growth, expected margin expansion due to operating leverage

Possible threats to the business from new technology

A look at other potential risks to Entegris

Should the industry's growth slow or even decline how it could affect Entegris

How Daniel values the business comparing it to its peer group

Other risks to the business not mentioned

The lessons learned from Entegris

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Diagnose your model assumptions  
Estimate the causal effects  
Using {rsample} to bootstrap our causal effect  
Review the R markdown file later!  
Resources  
Causal diagrams in R  
The basic idea  
ggdag  
Exercise 1  
Causal effects and backdoor paths  
Exercise 2  
Exercise 3  
Resources: ggdag vignettes  
Propensity Scores  
Exercise 1  
Walk through  
Propensity scores weighting  
Exercise 2  
Walkthrough  
Propensity score diagnostic  
SMD in R  
Outcome model  
Exercise  
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