

Name _____
Date assigned _____
Period _____

Taking Stock! My Stock Portfolio

DUE DATE: April 16- No Excuses

When you turn 16, you may want to get a job. That would be a great time to start your lifetime of putting money into some form of savings. Purchasing stocks is a way to make money from your investments. In 2017, if you work full time at minimum wage, you will make \$17,160. It is highly recommended that for every check you receive, you put 10% into savings. Could you become a millionaire by the time you retire? Possibly, but chances are not at minimum wage. Start NOW. Here's your chance to invest 10% of "your income" for one month. Good luck. BY THE END OF ONE MONTH, WHO WILL MAKE THE MOST MONEY IN OUR CLASS?

This is a required project. It will count as a test grade for this quarter. Your task is to select two to four companies and purchase their stock. You will then follow your purchases for one month. Your goal is to make money, so select wisely. You will be using the internet and spreadsheet to gather data and display it in a final presentation.

You will be assessed on:

- Your daily assignment completion (worth a total of 40 points)
- Your final spreadsheets
- Your data displays
- Your Presentation slide show
- Your written thoughts
- Your recorded presentation

In class you will:

- Look at various company stocks and their histories
- Set up your spreadsheets
- Record together your first few days' prices and totals
- Learn how to create various graphs to display data

Make your choices:

- Log onto finance.yahoo.com or <http://www.google.com/finance>
- Choose two to four companies on the American stock exchange in which to investigate
- List their names:
 - _____
 - _____
 - _____
 - _____
- Look at their history of stock prices— check out the prices for 1 month, 1 year, 5 years and 10 years (if possible)
- What is happening to the prices? Are they steadily going up? Do they sharply drop and rise? What catches your eye regarding these prices? Do you think you can make money off of them?

Begin a Stock Distribution Spreadsheet:

- Log onto <http://www.google.com/finance> or finance.yahoo.com
- Enter the name of company to look up, the stock symbol and current (last trade) value
- Record the company names, symbols, and current values onto the Stock Distribution Spreadsheet.
- Decide how many shares you will purchase from each company.
- Use the Stock Distribution Spreadsheet formulas to keep you from overspending. **You must not spend less than 99% of your money.**
- Create your Distribution Graph onto your Distribution Spreadsheet.

Daily Tracking of Your Stocks:

- Each day (before 7:00AM), you will check your stocks. You will record your daily prices and totals on your spreadsheet. Some of you could track your stocks on your smart phone.
- You will record your prices and totals to me DAILY. Each day is worth 2 pts. They add up to a total of 40 points. **FILL OUT THE GOOGLE FORM BY 7:00AM.** If you do not record and send me the numbers two days in a row, you will stay after to work on your project.

Portfolio Presentation Slide Show:

You will create a portfolio reporting your companies including:

- The **circle graph** showing the **distribution** of your stock- **screenshot**
- A **profile** for each company with the **name, address, sector, industry** and a **brief description** of the company (**two slides per company**)
- Data displays for EACH company created from your spreadsheet- **screenshots**
 - A **line graph** that tracks stock price fluctuation over the four weeks
 - A **double bar graph** to compare your purchasing and selling investment of each company.
 - The calculated **percent of change** for each stock (no graph)
- A **final analysis spreadsheet** to determine your profit or loss- **screenshot**

Final Thoughts:

- Double spaced
- Typed
- Carefully edited
- Answer these questions completely. **DO NOT TYPE THE QUESTIONS. INCLUDE THE QUESTIONS IN YOUR ANSWERS.**
- Paragraph 1: How did each of your stock purchases perform? This means, how did you end up financially? What was your purchasing investment and selling investment for each company? Did you make money or lose money, and by how much? What percent of profit or loss were for each company?
- Paragraph 2: What company or companies would you select if you could do this “for real?” Why? Were there any companies you wished you had chosen? Why?
- Paragraph 3: What are two lessons you (and not your friend) learned about investing your money? You never truly lost money, thank goodness, but you also weren’t able to really make it either. Would you invest money in your future? Why or why not?