Name:
Period:

Due Date: _____

Stock Project Competition

Congratulations! You have been hired to manage $10,000 worth of stocks! Here's what you have to do:

- Buy and maintain 5 different stocks. Each of the stocks must be
  - Traded on NYSE, NASDAQ or AMEX
  - Bought at a price of $5 or higher
  - Tracked 3 days a week (usually Mondays, Wednesdays and Fridays)
  - Be classroom appropriate
- Diversify your holdings! Your 5 stocks must always be from at least 4 different industries
- You can sell stocks and buy new ones on the last tracking day of the week
- ➢ You will earn extra credit for
  - having all of your 3 final gain or loss numbers (Accounting grid, Daily Tracker, Buy/Sell tracker) match
  - gaining the most in your class
  - beating Mr. Lejano

At the end of the semester, you will turn in a report (format of the paper must conform to the YLHS Research Paper Style Guide) of your results. This report is going to be made up of several different parts, include a printed title page and must be in this order.

1. Stocks – In My Own Words

   An explanation of what stocks are. This is at least 1 full typed page where you explain in your own words what stocks are to someone that is not familiar with the stock market (your younger brother or sister). Number each of the 3 parts of this paper

   1. What are stocks?
   2. Why do people invest in the stock market?
   3. Why does the value of stocks change?

2. Mutual Funds – In My Own Words

   An explanation of what mutual funds are. This is at least 1 full typed page where you explain in your own words what mutual funds are to someone that is not familiar with mutual funds (your younger brother or sister). Number each of the 4 parts to this paper.

   1. What are mutual funds?
   2. What's the difference between mutual funds and stocks?
   3. Why do people invest in mutual funds rather than stocks?
   4. Why does the value of mutual funds change?

3. Current Event #1 –

   You need to type a 2 paragraph (minimum of 1 page) discussion of a current event that had a significant effect on the value of one or more of your stocks. The first paragraph must be summarizing the event in your own words. The second paragraph must me an explanation of how this event had an effect on the demand for your company's stock. Staple the article to the back of your typed paper. The article must be from a reputable news source and must be at least one full page.

4. Current Event #2 –

You need to type a 2 paragraph (minimum of 1 page) discussion of a current event that had a significant effect on the value of one or more of your stocks. The first

paragraph must be summarizing the event in your own words. The second paragraph must me an explanation of how this event had an effect on the demand for your company's stock. Staple the article to the back of your typed paper. The article must be from a reputable news source and must be at least one full page.

5. Spreadsheet Charts/Graphs of 7 of your Stocks
   You need to use a spreadsheet program to create a chart of the price of a stock that you owned on each of the days that we tracked stocks. You must do this for the 7 stocks that you owned the longest. Directions for this will be given at a later date

6. Spreadsheet Graph/Chart For Your Daily Gain or Loss
   You need to use a spreadsheet program to create a chart of your daily gain or loss. Directions for this will be given at a later date

7. Accounting Grid
   This chart must be completely filled out and your final gain or loss must be circled with a colored pen

8. Buy/Sell Tracker
   This chart must be completely filled out and your final gain or loss must be circled with a colored pen

9. Daily Gain or Loss Tracker
   This chart must be completely filled out with accurate dates and your final gain or loss must be circled with a colored pen

10. 9 Paragraph Summation of Your Experience
    Introduction Paragraph
    - ☐ Introduce the reader to what you did
    - ☐ What your final gain or loss was (circle this with a colored pen)
    - ☐ What your feelings were about this project

    7 Body Paragraphs
    One for each of the 7 stocks that you owned the longest
    - ☐ What good or service this company sells
    - ☐ What the ticker symbol is and what exchange it's sold on
    - ☐ Why you thought this stock would rise in value
    - ☐ How it actually performed
    - ☐ At least one possible reason (which you have not used for the other body paragraphs) why the stock performed this way

    Conclusion Paragraph
    - ☐ Your final thoughts about how you did
    - ☐ Your final thoughts about the stock market
    - ☐ Why you will or will not invest in the stock market in the future

Fill out whenever you initiate a new transaction (buy or sell). When you buy, you start a new row. When you sell, you start a new row.

Accounting Grid

Amount of $ available after transaction

date	stock	exchange	# of shares	buy price	total cost	sell price	total sale	~~Uninvested~~ balance	teacher signature

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Buy/Sell Tracker

Total Revenue – Total Cost

Fill out whenever you buy a stock | Fill out whenever you sell a stock

Stock Name	Ticker Symbol	Buy Price	# of Shares	Total Cost	Sell Price	# of Shares	Total Revenue	Gain or Loss
							Final Gain or Loss -->	

Name _____
Period _____

Stock Tracker

Date:					
Ticker Symbol	Today's Price	# of Shares Owned	Current Stock Value	Original Cost of that Stock (see Accounting Grid)	Gain or Loss from that Stock
			Today's Price X # of Shares Owned		Current Stock Value - Original Cost of that Stock
Stock 1					
Stock 2					
Stock 3					
Stock 4					
Stock 5					
		Last Uninvested Balance->			
		Total Gain or Loss ->		<---(Sum of 5 Stock Values & Last Uninvested Balance) - $10,000	

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