

# RESEARCHING STOCKS: AN INVESTMENT PORTFOLIO SIMULATION



SAVING AND INVESTING UNIT ASSESSMENT – ADVANCED LEVEL  
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RECOMMENDED GRADE LEVELS	AVERAGE TIME TO COMPLETE	EACH LESSON PLAN IS DESIGNED AND CONTINUALLY EVALUATED “BY EDUCATORS, FOR EDUCATORS.” THANK YOU TO THE FOLLOWING EDUCATORS FOR DEVELOPING COMPONENTS OF THIS LESSON PLAN.
10-12	<b>Anticipatory Set &amp; Facilitation:</b> 90-120 minutes	<ul style="list-style-type: none"> <li>Robin Palmer, Business and Math, Corona del Sol High School, Chandler, Arizona</li> </ul>

NATIONAL STANDARDS	LESSON PLAN OBJECTIVES
<p>The curriculum is aligned to the following national standards:</p> <ul style="list-style-type: none"> <li>National Standards for Financial Literacy by CEE</li> <li>American Association of Family and Consumer Sciences</li> <li>National Business Education</li> <li>National Standards in K-12 Personal Finance Ed</li> <li>Common Core English Language Arts</li> </ul>	<p>Upon completion of this lesson, participants will be able to:</p> <ul style="list-style-type: none"> <li>Understand how individuals track stocks they choose for an investment portfolio</li> <li>Explore consequences of financial decisions relative to investing choices</li> </ul>

MATERIALS		
MATERIALS PROVIDED IN THIS LESSON PLAN	MATERIALS SPECIFIC TO THIS LESSON PLAN BUT AVAILABLE AS A SEPARATE DOWNLOAD	MATERIALS TO ACQUIRE SEPARATELY DEPENDING ON OPTIONS TAUGHT
<ul style="list-style-type: none"> <li>Option 1: Buying Stocks to Create a Diverse Portfolio 2.4.8.A1</li> <li>Option 2: Investing in Stocks to Create a Diversified Portfolio 2.4.8.A2</li> <li>Information to Know About Trading Stocks 2.4.8.E1</li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>	<ul style="list-style-type: none"> <li>Internet access</li> </ul>

RESOURCES	
EXTERNAL RESOURCES	
<p><b>External resources referenced in this lesson plan:</b></p> <ul style="list-style-type: none"> <li>Stock Market Rap: <a href="https://www.youtube.com/watch?v=hjuMlolaKo4">https://www.youtube.com/watch?v=hjuMlolaKo4</a></li> <li>Companies in the Dow Jones: <a href="http://money.cnn.com/data/dow30/">http://money.cnn.com/data/dow30/</a></li> <li>Companies in S&amp;P 500: <a href="http://money.cnn.com/data/markets/sandp/">http://money.cnn.com/data/markets/sandp/</a></li> </ul>	
TAKE CHARGE TODAY RESOURCES	
<p><b>Similar lesson plan at a different level:</b></p> <ul style="list-style-type: none"> <li>None</li> </ul>	<p><b>Optional lesson plan resources:</b></p> <ul style="list-style-type: none"> <li>Investing with Lawn Boy 1.4.3</li> <li>Fundamentals of Investing Lesson Plan 2.4.4</li> <li>Let’s Talk Stocks 2.4.7</li> </ul>

### CONTENT

Using real-time trading and real-world current events, participants will practice research and decision-making skills completing Take Charge Today's *Researching Stocks: a Portfolio Investment Simulation* 2.4.8. This lesson is designed for participants to use on consecutive days so they can track stock performance and manage their simulated investment portfolio.

There are two options for this simulation: Option #1 allows individuals to research and track stocks. Option #2 is designed for up to six different groups to work together as a team to create a stock portfolio. You will need to choose which option you wish to use.

### OPTIONAL INSTRUCTION

*This lesson is designed to be taught as a stand-alone lesson. However, background content knowledge from the following lesson plans is directly related to this lesson and may be helpful for participants.*

- Fundamentals of Investing Lesson Plan 2.4.4
- Let's Talk Stocks Lesson Plan 2.4.7

### LESSON FACILITATION

#### PREPARE

*Visual indicators to help prepare the lesson*

#### INSTRUCT

*Instructions to conduct the lesson facilitation*

#### CUSTOMIZE

*Potential modifications to lesson facilitation*

#### ANTICIPATORY SET

##### Stock Market Rap

Approximate time: 6-8 min (5 min for video)

Materials to prepare:



- Stock Market Rap video. URL located in External Resources section at the top of the lesson plan.
1. To increase interest in the subject of investing and remind participants of language of the stock market, show this 5 minute video.
  2. Conduct a quick review with participants by conducting a 2-3 minute general discussion of terms and ideas mentioned in the video.

#### RECOMMENDED FACILITATION

There are two facilitation options provided for this Performance Assessment

1. Option 1: Individuals will research stocks and create a diversified portfolio
2. Option 2: Groups will research and select stocks to create a diversified portfolio

##### Option 1: Buying Stocks to Create a Diversified Portfolio

Approximate time: 90-120 min (plus time to check stock prices on consecutive days)

Materials to prepare:



- 1 *Buying Stocks to Create a Diversified Portfolio* 2.4.8.A1 per participant
  - *Information to Know About Trading Stocks* 2.4.8.E1
  - Internet access per participant
1. Pass out 1 *Buying Stocks to Create a Diversified Portfolio* 2.4.8.A1 and 1 *Information to Know About Trading Stocks* 2.4.8.E1 to each participant.
  2. Explain the mission in this simulation (it is stated at the top of page 1 of *Buying Stocks to Create a Diversified Portfolio* 2.4.8.A1).
  3. Participants will have \$10,000 to invest.

Option 1 is written for individuals to research stocks.

4. Participants should understand that they must pay for each buy or sell transaction. For this purpose, they will assume they will use E\*Trade for their stock purchases. **E-Trade will charge \$6.95 per trade.** These fees need to come from their \$10,000.
5. In order to find five solid companies as investment choices, participants will most likely have to research twice as many companies and then pick five.
6. Have participants begin by researching companies in the **Dow Jones Index**. The URL is in the external resources section at the top of the lesson plan.
  - a. Participants will choose five companies from the Dow Jones list and fill in the spreadsheet.
7. Next, participants will research companies in the **S&P 500 Index**.
  - a. There are 500 companies in this index, so make sure participants take some time to explore.
  - b. Remind participants they should have a **diverse portfolio** so they don't want to have five companies that are all related to consumer goods or to financial services, etc.
  - c. Instruct them to choose five companies from the list and fill in the spreadsheet.
8. Now that participants have researched ten companies, they are ready to compare their data.
  - a. Remind participants they want a diverse portfolio, so look at the industry and **sector information** for their companies
  - b. Also encourage participants to consider comparing company **financial and historical data**.
9. After comparing and analyzing the ten company stocks they chose from the Dow Jones Index and S&P 500 Index, it is now time for participants to **narrow down their ten companies to their top five choices**.
  - a. Have participants complete the table in **step 3** and explain their decisions including details of the key financial indicators that influenced their choices.
10. Participants will record their stock purchases in **step 4**.
  - a. Remind them they have \$10,000 to spend for the stock purchases and their broker fees.
  - b. The price of each stock will partially determine how many shares they can purchase, so participants will need to calculate how many shares they can buy for each of the five stocks they have chosen. *\*They may not put all their dollars in one basket (stock); they must invest in five different stocks so they have a diversified portfolio.*
  - c. Participants will make their decision, calculate their costs, and record the numbers on the chart to show how they decided to spend their investment money.
11. In **step 5**, participants should have **15 minutes during class time for the next three trading days** to track the performance of their stocks.
  - a. Participants should write down the prices of each stock on their worksheet for three days, recording the up or down price of each stock they chose for their portfolio.
12. Ask participants to answer the reflection questions after they have tracked their investments for three days.
  - a. Did your stocks have a gain or loss after three days?
  - b. If you have the chance to invest when you are an adult, do you think you'll put money into the markets? Why or why not?

**Option 2: Investing in Stocks to Create a Diversified Portfolio**

Approximate time: 90-120 min (with 15 min time allotted for three consecutive days for teams to track their stocks' performance.

Materials to prepare:



- 1 *Investing in Stocks to Create a Diversified Portfolio* 2.4.8.A2 per participant
  - *Information to Know About Trading Stocks* 2.4.8.E1
  - Internet access per participant
1. Pass out 1 *Investing in Stocks to Create a Diversified Portfolio* 2.4.8.A2 and 1 *Information to Know About Trading Stocks* 2.4.8.E1 to each participant.
  2. Explain the mission in this simulation (it is stated at the top of page 1 of *Investing in Stocks to Create a Diversified Portfolio* 2.4.8.A2).
  3. Participants will have \$10,000 of money to invest as a group
  4. Participants should understand that they must pay for each buy or sell transaction. For this purpose, they will assume they will use E\*Trade for their stock purchases. **E-Trade will charge \$6.95 per trade.** These fees need to come from their \$10,000.
  5. In order to find three solid companies as their investment choices, they will most likely have to research five companies and then pick three.
  6. Each group is assigned specific companies to research. These assignments are given on the charts from **step 1**.
  7. Teams will research companies on both the Dow Jones and S&P 500 indices.
  8. Now that teams have researched five companies, they are ready to compare their data.
    - a. Remind participants they want a diverse portfolio, so look at the industry and sector information for their companies
    - b. Also encourage participants to consider comparing company financial and historical data.
  10. After comparing and analyzing the five company stocks the team has been assigned, groups will narrow their choices to three company stocks and complete the table in **step 3**.
    - a. Groups will explain their decisions including details of the key financial indicators that influenced their choices.
  11. Participants will record their stock purchases in **step 4**.
    - a. Remind each team they have \$10,000 to spend for the stock purchases and broker fees.
    - b. The price of each stock will partially determine how many shares they can purchase, so participants will need to calculate how many shares they can buy for each of the three stocks they have chosen. *\*They may not put all their dollars in one basket (stock); they must invest in three different stocks so they have a diversified portfolio.*
    - c. Teams will make their decision, calculate their costs, and record the numbers on the chart to show how they decided to spend their investment money.
  12. In **step 5**, teams will have **15 minutes during class time for the next three trading days** to track the performance of their stocks.
    - a. Participants should write down the prices of each stock on their worksheet for three days recording the up or down price of each stock they chose for their portfolio
  13. Ask participants to answer the reflection questions after they have tracked their investments for three days.
    - a. Did your stocks have a gain or loss after three days?
    - b. If you have the chance to invest when you are an adult, do you think you'll put money into the markets? Why or why not?

This is a group activity with assigned stocks to research. There are scenarios for up to 6 teams.

## Information to Know About Trading Stocks

What does this company make or sell

Is this a product/service that has been around for a long time? Do you expect this product/service to have any major changes in the next 10 years? Is this product/service a need or a want? You will need to determine what types of companies you feel will be most successful.

P/E Ratio

Are you looking for a low risk company? Then look for a lower P/E ratio. Does the P/E ratio match financially successful companies (P/E ratio of 7-10)? Determine your risk level and the P/E ratio that matches your investing goal.

Market Cap

Remember that market cap has to do with the size of the company. Is this a Mega-cap, Large-cap, Small-cap, Micro-cap, or Nano-cap company? You may want to diversify your portfolio by market cap as well.

Charts

When you look at the stock price over the past years, what do you notice? Has the company had steady increases? Ups and downs? Is the price currently falling? What do you want to see in the companies you plan to invest in? You will need to determine which types of price fluctuations match your risk level.

Analysts forecasts

What are analysts predicting may happen with this stock? Analysts study stock performance all of the time. If they predict problems with a stock, they are probably right.

Gross Income

How much money did the company make last year? A high income could indicate good sales and a valuable product/service.

Net Income

How much income did the company make after it paid for its expenses? If a company had a high gross income and then a very low net income, then they have some major expenses. This could spell trouble down the road if the prices of their supplies increase.

EPS  
(Earnings Per Share)

The EPS indicates how well a company is doing overall. You want companies with a high EPS.

Net Cash Flow from Operating Activities

Cash flow measures the cash-generating abilities of the company's core operations rather than from its ability to raise capital or purchase assets. Cash helps companies expand, develop new products, buy back stock, pay dividends, and reduce debt. A higher cash flow number is good.

Total Shareholder Equity

Shareholder equity represents the company's book value. It is calculated by subtracting liability (what the company owes) from assets (what the company owns). A high value usually means a company has been profitable and will continue to be so.

## Option #1: Buying Stocks to Create a Diversified Portfolio

### An Individual Investment Activity

	Total Points Earned
	Total Points Possible
	Percentage

Name \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

**Your Mission:** You have received **\$10,000** as a graduation gift and want to invest it for your future. You have learned about saving and investing and have decided that you will purchase stocks with this money. You have nearly 40 years until you retire, so this is a chance to find some companies with good growth potential that will provide a good return on your investment. You want to minimize your risk by having a diverse portfolio, so you plan to include five different companies from three different sectors.



You plan to use E\*Trade for your stock purchases, so keep in mind that they charge \$6.95 per trade. These fees need to come from your \$10,000.

You know that in order to find five solid companies, you will have to research twice as many, so you have your work cut out for you. You plan to use some standard factors to compare your companies so that you are basing your decision on performance, not on your intuition. Let's get started.

**Step 1: Research and Data Collection**

**Companies in the Dow Jones**

Begin by researching companies in the Dow Jones. Use this website to find the current companies: <http://money.cnn.com/data/dow30/>. Choose five companies from the list. Click on the ticker symbol to go to the CNN Money info about this company. Look over the press releases, the financial overview, and especially the forecast information. Use the spreadsheet below to gather the specific information about these companies that you will be comparing.

**Companies in the S&P 500**

Next you will research companies in the S&P 500. Use this website to find the current companies: <http://money.cnn.com/data/markets/sandp/>. There are 500 companies in this index, so take some time to explore. Remember you want to have a diverse portfolio so you don't want to have five companies that are all related to consumer goods or to financial services, etc. Choose five companies from the list. Click on the ticker symbol to go to the CNN Money info about this company. Look over the press releases, the financial overview, and especially the forecast information. Use the spreadsheet below to gather the specific information about these companies that you will be comparing.

	Stock #1	Stock #2	Stock #3	Stock #4	Stock #5
<b>Company Info</b>					
Name of company					
Ticker symbol					
Current Price					
What does this company make or sell?					
P/E Ratio					
<b>Profile Tab</b>					
Sector					
Industry					
Market Cap					
<b>Charts Tab</b>					
What has happened to the stock's price in the last 1 year?					
last 3 years?					
last 10 years?					
<b>Forecasts Tab</b>					
What do analysts predict will happen with this stock in the next 12 months?					
● High forecast					
● Median forecast					
● Low forecast					
<b>Financials Tab</b>					
Income Statement					
● Gross Income					
● Net Income					
● EPS (Earnings Per Share)					
Cash Flow Statement					
● Net Cash Flow – Operating Activities					
Balance Sheet					
● Total Shareholder Equity					

	Stock #6	Stock #7	Stock #8	Stock #9	Stock #10
<b>Company Info</b>					
Name of company					
Ticker symbol					
Current Price					
What does this company make or sell?					
P/E Ratio					
<b>Profile Tab</b>					
Sector					
Industry					
Market Cap					
<b>Charts Tab</b>					
What has happened to the stock's price in the last 1 year?					
last 3 years?					
last 10 years?					
<b>Forecasts Tab</b>					
What do analysts predict will happen with this stock in the next 12 months?					
● High forecast					
● Median forecast					
● Low forecast					
<b>Financials Tab</b>					
Income Statement					
● Gross Income					
● Net Income					
● EPS (Earnings Per Share)					
Cash Flow Statement					
● Net Cash Flow – Operating Activities					
Balance Sheet					
● Total Shareholder Equity					



**Step 2: Compare Your Data**

Now that you have researched 10 companies, you are ready to compare your data. Remember that you want a diverse portfolio, so look at the industry and sector information for your companies in addition to comparing their financial and historical data. When comparing financial numbers, use the *Information to Know About Trading Stocks* 2.4.8.E1 resource for some reminders about what you are looking for.

**Step 3: Make Your Decision**

Narrow down your 10 companies to your top 5 choices. Complete the table below to explain your decision including details of the key financial indicators that influenced your choices.

	Companies you selected	What made you believe these companies would be a good investment for your portfolio?
Choice #1		
Choice #2		
Choice #3		
Choice #4		
Choice #5		

**Step 4: How Many Shares Will You Purchase?**

Remember that you have \$10,000 to spend for the stock purchases and your broker fees. The price of each stock will partially determine how many shares you can purchase. Your confidence in these companies may also influence your decision to purchase more or fewer shares of one company compared to another. Make your decision, calculate your costs, and record the numbers below to show how you decided to spend your investment money.

	Company Ticker Symbol	Current Price	# of Shares You Will Purchase	Broker Fee	Total Cost of this Purchase
Choice #1					
Choice #2					
Choice #3					
Choice #4					
Choice #5					
<b>Total Money Invested</b>					

**Step 5: Track the stocks in your portfolio for three days**

**Reflection Questions**

1. Did any of your stocks have a gain after three days? Which ones?



2. Did any of your stocks have a loss after three days? Which ones?

3. If you have the chance to invest when you are an adult, do you think you'll put money into the markets? Why or why not?

## Option #2: Investing in Stocks to Create a Diversified Portfolio

### A Group Investment Activity

	Total Points Earned
	Total Points Possible
	Percentage

Date \_\_\_\_\_

Class \_\_\_\_\_

Names and group: \_\_\_\_\_

**Your Mission:** You are a member of an investment team. Your group has received **\$10,000** as an incentive and want to invest it for the future. The members of your group have learned about saving and investing and have decided they will purchase stocks with this money. All members of your group have nearly 40 years until they retire, so this is a chance to find some companies with strong growth potential that will provide a good return on your investment. Your group will want to minimize risk by having a diverse portfolio, so they plan to include three different companies from different sectors. Your team plans to use E\*Trade for stock purchases, so keep in mind that they charge \$6.95 per trade. These fees need to come from the \$10,000 incentive fund.



In order to find three solid companies to invest in, your team will have to research more than that, so you have your work cut out for you. You plan to use some standard factors to compare your companies so that you are basing your decision on performance, not on your intuition. Let's get started.

**Step 1: Research and Data Collection**

All members of your investment team should use the stock data provided for the five companies in your group. Record the information on the spreadsheet below. Make sure you label your numbers as millions and billions as applicable.

**Companies in Group A**

	Stock #1	Stock #2	Stock #3	Stock #4	Stock #5
<b>Company Info</b>					
Name of company	Aflac	AT&T	Devon Energy	Dow DuPont	Alexion Pharmaceuticals
Ticker symbol					
Current Price					
What does this company make or sell?					
<b>Profile</b>					
Sector					
Industry					
Market Cap					
<b>Stock Charts</b>					
What has happened to the stock's price in					
last 1 year?					
last 3 years?					
last 10 years?					
<b>Forecasts</b>					
What do analysts predict will happen with this stock in the next 12 months?					
● High forecast					
● Median forecast					
● Low forecast					
<b>Financials</b>					
Income Statement					
● Gross Income					
● Net Income					
● EPS (Earnings Per Share)					
Cash Flow Statement					
● Net Cash Flow – Operating Activities					
Balance Sheet					
● Total Shareholder Equity					

**Companies in Group B**

	Stock #1	Stock #2	Stock #3	Stock #4	Stock #5
<b>Company Info</b>					
Name of company	Exxon Mobile	Harley Davidson	McDonalds Corp	Johnson & Johnson	Merck & Co
Ticker symbol					
Current Price					
What does this company make or sell?					
<b>Profile</b>					
Sector					
Industry					
Market Cap					
<b>Stock Charts</b>					
What has happened to the stock's price in					
last 1 year?					
last 3 years?					
last 10 years?					
<b>Forecasts</b>					
What do analysts predict will happen with this stock in the next 12 months?					
● High forecast					
● Median forecast					
● Low forecast					
<b>Financials</b>					
Income Statement					
● Gross Income					
● Net Income					
● EPS (Earnings Per Share)					
Cash Flow Statement					
● Net Cash Flow – Operating Activities					
Balance Sheet					
● Total Shareholder Equity					

**Companies in Group C**

	Stock #1	Stock #2	Stock #3	Stock #4	Stock #5
<b>Company Info</b>					
Name of company	Apple	Bank of America Inc	3M	American Airlines Group	American Express
Ticker symbol					
Current Price					
What does this company make or sell?					
<b>Profile</b>					
Sector					
Industry					
Market Cap					
<b>Stock Charts</b>					
What has happened to the stock's price in					
last 1 year?					
last 3 years?					
last 10 years?					
<b>Forecasts</b>					
What do analysts predict will happen with this stock in the next 12 months?					
● High forecast					
● Median forecast					
● Low forecast					
<b>Financials</b>					
Income Statement					
● Gross Income					
● Net Income					
● EPS (Earnings Per Share)					
Cash Flow Statement					
● Net Cash Flow – Operating Activities					
Balance Sheet					
● Total Shareholder Equity					

**Companies in Group D**

	Stock #1	Stock #2	Stock #3	Stock #4	Stock #5
<b>Company Info</b>					
Name of company	Travelers Companies	Caterpillar Inc.	Cisco Systems	Best Buy Co Inc.	Carnival Corp.
Ticker symbol					
Current Price					
What does this company make or sell?					
<b>Profile</b>					
Sector					
Industry					
Market Cap					
<b>Stock Charts</b>					
What has happened to the stock's price in					
last 1 year?					
last 3 years?					
last 10 years?					
<b>Forecasts</b>					
What do analysts predict will happen with this stock in the next 12 months?					
● High forecast					
● Median forecast					
● Low forecast					
<b>Financials</b>					
Income Statement					
● Gross Income					
● Net Income					
● EPS (Earnings Per Share)					
Cash Flow Statement					
● Net Cash Flow – Operating Activities					
Balance Sheet					
● Total Shareholder Equity					

**Companies in Group E**

	Stock #1	Stock #2	Stock #3	Stock #4	Stock #5
<b>Company Info</b>					
Name of company	Costco Wholesale Corp	Darden Restaurants	Home Depot	General Dynamics	E*Trade
Ticker symbol					
Current Price					
What does this company make or sell?					
<b>Profile</b>					
Sector					
Industry					
Market Cap					
<b>Stock Charts</b>					
What has happened to the stock's price in					
last 1 year?					
last 3 years?					
last 10 years?					
<b>Forecasts</b>					
What do analysts predict will happen with this stock in the next 12 months?					
• High forecast					
• Median forecast					
• Low forecast					
<b>Financials</b>					
<b>Income Statement</b>					
• Gross Income					
• Net Income					
• EPS (Earnings Per Share)					
<b>Cash Flow Statement</b>					
• Net Cash Flow – Operating Activities					
<b>Balance Sheet</b>					
• Total Shareholder Equity					



**Companies in Group F**

	Stock #1	Stock #2	Stock #3	Stock #4	Stock #5
<b>Company Info</b>					
Name of company	Intel Corp	JP Morgan Chase	Verizon Communications	Visa Inc	United Health Corp.
Ticker symbol					
Current Price					
What does this company make or sell?					
<b>Profile</b>					
Sector					
Industry					
Market Cap					
<b>Stock Charts</b>					
What has happened to the stock's price in					
last 1 year?					
last 3 years?					
last 10 years?					
<b>Forecasts</b>					
What do analysts predict will happen with this stock in the next 12 months?					
• High forecast					
• Median forecast					
• Low forecast					
<b>Financials</b>					
Income Statement					
• Gross Income					
• Net Income					
• EPS (Earnings Per Share)					
Cash Flow Statement					
• Net Cash Flow – Operating Activities					
Balance Sheet					
• Total Shareholder Equity					

### Step 2: Compare Your Data

Now your team is ready to compare company data. Remember that your team of investors wants a diverse portfolio, so look at the industry and sector information for your assigned companies in addition to comparing their financial and historical data. When looking at the comparisons, use the *Information to Know About Trading Stocks* 2.4.8.E1 resource for some reminders about what you are looking for. Which types of companies would you want in your portfolio? Are you looking for high numbers? Trends? Be as objective as possible.

### Step 3: Make Your Decision

As your team evaluates the data, highlight which two companies have the best numbers for the following financial factors: market cap, median analyst forecast, gross income, net income, EPS, net cash flow, total shareholder equity. That will make it easier to see which companies stand out. Once you have them highlighted, review all of your data and narrow down your 5 companies to your top 3 choices. Complete the table below to explain your team's decision including details of the key financial indicators that may have influenced the team's choices.

#### Final Team Portfolio Selections

	Companies your team selected	What made your team believe these companies would be a good investment for your portfolio?
Choice #1		
Choice #2		
Choice #3		

### Step 4: How Many Shares Will You Purchase?

Remember that your team has \$10,000 to spend for the stock purchases and your broker fees. The price of each stock will partially determine how many shares your team can purchase. Your confidence in these companies may also influence your decision to purchase more or fewer shares of one company compared to another. Make your decision, calculate your costs, and record the numbers below to show how you decided to spend your investment money.

#### Recording Your Team's Stock Purchases

	Company Ticker Symbol	Current Price	# of Shares You Will Purchase	Broker Fee	Total Cost of this Purchase
Choice #1					
Choice #2					
Choice #3					
<b>Total Money Invested</b>					

**Step 5: Track the stocks in your portfolio for three days**

**Reflection Questions**

1. Did any of your stocks have a gain after three days? Which ones?



2. Did any of your stocks have a loss after three days? Which ones?

3. If you have the chance to invest when you are an adult, do you think you'll put money into the markets? Why or why not?