Capstone Project

Prepared by
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Paterson School Number 3
TITLE: Stock Market Project
SUBJECT: Mathematics
GRADE LEVEL: 6th – 8th
DURATION: Four Weeks

OBJECTIVE:
Students will apply skills from numerical operations and data display clusters in an ongoing project.

NJCCCS:
4.1A1-6, 4.1B1, 4.3.8C.1, 4.4.8A1

MATERIALS:
- Internet access
- Stock Market worksheets/spreadsheets
- Calculators
- Microsoft Excel or other spreadsheet program
- Microsoft Power Point

ACTIVITIES:
- View Brain Pop videos “Stocks and Shares” and “Stock Market”.
- Allot $1,000 for stock portfolio and discuss requirements of the project.
- Record company name and stock symbols.
- Record share price and determine number of shares to be purchased, not exceeding $1000.
- Track daily stock price fluctuation.
- Create a circle graph to depict distribution of stock.
- Create line graphs to track stock price fluctuation.
- Create a double bar graph to compare the initial and final investment value.
- Research parent companies of stocks held in portfolio.
- Calculate and record percent of change for each stock held.
- Develop power point presentation of stock portfolio.

ASSESSMENT:
- Completion of daily assignments
- Data Displays
- Stock Market worksheets
- Power Point Presentation

VOCABULARY:
- **Investment**: use of money for future profit
- **Profit**: income or money earned from an investment
- **Loss**: money lost from an investment
- **Dividends**: earnings a company pays to stockholders for using their savings.
- **Stock**: a share of ownership in a company. A stock represents a claim on the company’s assets and profits.
- **Stockbroker**: an agent that charges a fee or commission for buying and selling shares and other securities for investors
- **Shareholder**: one of many owners of a company.
- **Stock Market**: an organized market where brokers buy and selling stocks.
STUDENT HANDOUTS & WORKSHEETS
Stock Market Project

You and your partner are given $1000.00 to invest in the stock market. You will track your investment for two weeks and create a Portfolio to compete for the highest profit in your class. HAPPY INVESTING & GOOD LUCK!!

1. Make Choices:
   - Choose a partner
     Name(s) ________________________________
     ___________________ __________________
   
     From list provided choose up to four (4) companies in which to invest.
     Company Name (s) ________________________________
     ___________________ __________________

2. Create a portfolio:
   - Enter the name of company to look up the stock symbol and current (last trade) value.
   - Record the company names, symbols, and current values on the spreadsheet provided.
   - Decide how many shares you will purchase for each company.
   - Calculate the percent of investment for each company and record on spreadsheet.

   Daily Tracking:
   - Track the changes in close price and record on daily tracking sheet.

3. Display your Data:
   Use Microsoft Excel to create Data Displays
   - Create a graph to show your Investment Distribution. Included on this graph should be the Company name (or symbol) and the amount/percent of money initially invested in each company.
   - After each week of tracking your stocks, create a graph showing the daily changes in stock value.
   - Create a graph comparing your initial and final value of each company. Calculate the percent of change for each

4. Create a report:
   - Create a Power Point displaying your Portfolio results.
     Include:
     - a profile for each company with the name, address, sector, industry and a brief summary about the company.
     - an image of a stock certificate for each company, if possible.
     - data displays created on Microsoft Excel.
**STOCK MARKET CENTER PROJECT**

Name(s)_________________________________________  Class ________________

COMPANY NAME:_________________________________  STOCK SYMBOL:_______________

Purchase Price:________________________

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<thead>
<tr>
<th>WEEK 1</th>
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# STOCK MARKET PROJECT - Initial

Name(s)  
______________________________________________  Class ______________

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<thead>
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<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
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<tbody>
<tr>
<td>Company Name</td>
<td>Symbol</td>
<td>Share Price</td>
<td>Number of Shares</td>
<td>Money Invested ( E = C \times D )</td>
<td>Percent of Investment ( F = E / G \times 100 )</td>
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Total Investment \( G \)  100%
# STOCK MARKET PROJECT - Final

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<td>Company Name</td>
<td>Symbol</td>
<td>Final Share Price</td>
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Stock Purchase Worksheet

Name of Company and Stock Symbol: ______________________________________

1. Last Trade price of one share of ______________ Stock: ______________
   Today’s High price of one share of ____________ Stock: __________
   Today’s Low price of one share of ____________ Stock: __________
   The difference between current High price and the current Low price:
   ___________________________________________________________________

   Previous Day’s Close price of one share of ________Stock: ______
   Does the Change show an increase or a decrease? _______________
   How much is the change? _______________ 

2. If you bought 10 shares of __________ stock at the close of the stock market
   yesterday, how much did you pay? _________________

   Write an equation to show the answer. _____________________________

3. If you were to sell those 10 shares of __________ stock at the current price,
   would you make or lose money? ______________

   How much money would you make or lose? ______________

   Write an equation to show the answer. _____________________________

Notes about the Corporation: ____________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________
_______________________________________________________________________