

Stock Market Simulation Rules/Requirements

1. Start with \$10,000 (your investment balance).
2. 2 days a week (Tues. and Thurs. check prices and buy/sell)
3. Must initially buy 5 stocks (using as much of the \$10k as possible)
*min. price is \$2/share
4. You must hold at least 1 stock the entire time (even if you hold only a few shares, you have to “stay the course” with at least one stock)
5. For each 3-week period you must sell and buy at least once.
6. Must keep a **tally sheet** for every stock (no matter how long you own it)
7. Every time you buy or sell a stock, you must calculate the transaction on your **accounting grid** and must get my signature
8. **Extra credit**
25 points to person who earns most \$
25 points to person who loses most \$
10 points to every person who earns more than me, Mr. Claborn☺
9. 1 cent commission is charged on every share you buy and sell (totaled at the end of the simulation)
10. You need (at least) 5 symbols to start; end with at least 8
11. Web page used in class will be Yahoo-finance (it's one of the links on the home page – look for “Finance” and click on it)
12. Smartmoney.com and Google are also good “free” resources to set up and monitor your portfolio.

Total Gains or Losses Worksheet

Date:

Stocks You Currently Own: Today's Price: # of shares: Total:

Date:

Stocks You Currently Own: Today's Price: # of shares: Total:

Date:

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Stock Market Project Guidelines

Cover

Cover must have a visual. The visual may be computer generated or drawn by hand. The visual should relate to a stock you owned or to the stock market in general. Writing in fonts does not count as a visual.

Table of Contents

Typed and in the order shown on Grade Sheet / rubric. Page numbers included. See samples for proper format / what should be included.

Portfolio Summary

One to two page summary of your stock experience. The header for this page will be the profit or loss you made during the simulation. If you incurred a loss, be sure to put a negative sign next to the number. For example, if you lost \$2000.00, then the header for the page would be -\$2000.00. In the body of the paper you will then explain how you were able to lose so much money in such a short period of time. Include the names of the stocks, your reasoning for picking the stocks you picked, your reason for holding, and your reason for selling. It is appropriate to include buy and sell prices, but it is not required. This is very factual information, so please try to be creative in your writing style. Include your thoughts and reasons.

Simulation Evaluation

Two page evaluation of the stock market simulation. Your evaluation should encompass, but it not limited to the following questions.

What was your favorite part of the simulation?

What was your least favorite part of the simulation?

What did you learn from the simulation?

Was there anything you had hoped to learn and didn't?

Was the simulation too long or too short?

Was anything confusing or unclear?

Is the stock market more understandable to you now?

How difficult was the written report? What parts did you enjoy or dislike?

What advice would you give to someone who was about to begin this simulation?

***Remember, this is in essay format, not just one big paragraph. 12 point font, 1 inch margins, Double-spaced**

Accounting Grid

The original accounting grid must be included with appropriate signatures. If you are tracking your stocks on the computer, you may turn in the typed page, but the original signed accounting grid must also be included. Retyping it on Word or Excel will earn you 3 points of extra credit.

Tally Sheets

Original tally sheets must be kept and turned in. Retype them using Excel or Word. You still must include the originals. Total Gains / Losses should be included (you should have at least 8 original tally sheets if you followed the rules of the simulation)

Graphs

You are to have one graph per company you have owned throughout the simulation with a minimum of 8 companies. Also included is a graph of your 'total gain and losses' throughout the project. **All graphs are to be computer generated.**

This project should be completed in a professional format. Neatness and style will be counted towards your overall project grade. Due Date – Jan. 10. Every day late = 25% OFF!

How to use Excel:

Each little box on Excel is called a **cell**. Enter only 1 (1 price, 1 title, etc.) item in each cell.

Entering Information

Decide where you want to start your table and click on the cell where the top left corner of the table will be and type DATE into that cell, then PRICE in the next cell to the right and CHANGE in the cell to the right of PRICE. Below DATE enter all of the dates that you have listed on that particular tally sheet and all the prices and changes for each date.

Somewhere on each page you need to enter the rest of the information that is on the Tally Sheet, like the name, symbol, exchange, and the buy and sell prices, so decide where you want those to be and enter every item in it's own cell.

Making a Graph

-Once all of your information is entered, highlight all of the information, including titles, and click on the **chart wizard** to make a graph of the information.

-Decide what kind of graph you want to do (usually line, area, or bar) then decide what other things you may want to put on the graph from the chart wizard. Click FINISH when you have changed everything that you want and it will put it on your page.

- if you would like to change the background of your graph, right click it and click FORMAT DATA SERIES and select what color you want to make it or select FILL EFFECTS to add multiple colors or a picture.

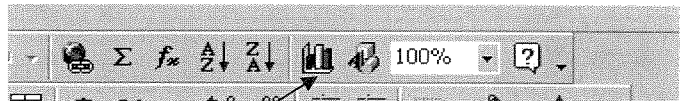
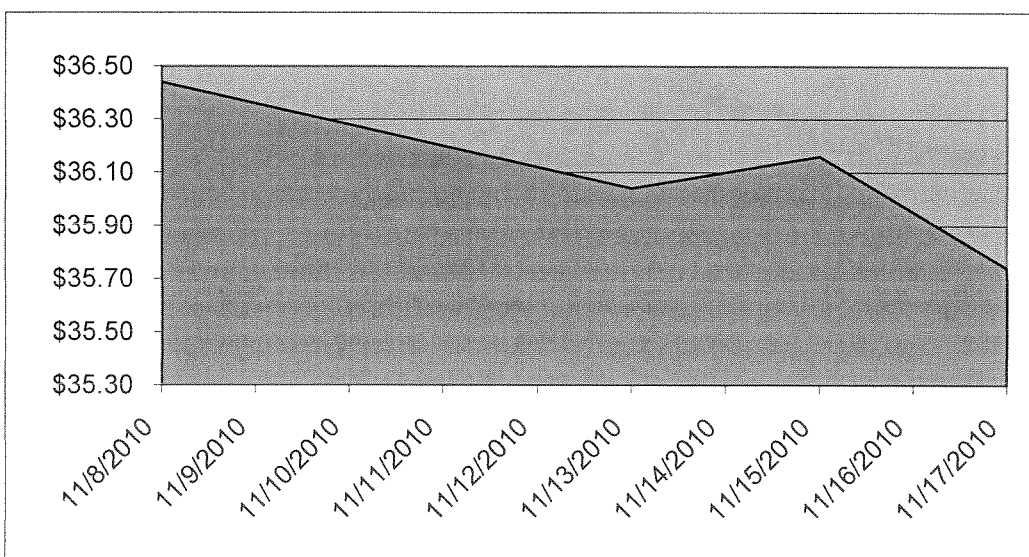


Chart wizard

YHOO		
Date	Price	Change
8-Nov	\$36.44	xx
13-Nov	\$36.04	-0.4
15-Nov	\$36.16	0.12
17-Nov	\$35.74	-0.42

Name of Stock:	YHOO (Yahoo)
Exchange:	NYSE
Buy Price:	\$36.44
Sell Price:	\$35.74
Loss Per Share:	\$0.70
Total Loss:	\$42.00



Name _____ Period _____

Stock Market Grade Sheet

1. Cover with Visuals _____/5
2. Table of Contents (typed & in order) _____/10
3. Portfolio Summary _____/25
5. Simulation Evaluation _____/40
6. Accounting Grid (original w/ signatures) _____/10
7. Tally Sheets (originals + final drafts
typed, including total gains/losses) _____/45
8. Graphs (at least 9, incl. total gains/losses) _____/45
9. Effort throughout the project _____/10
10. Overall presentation, neatness, clarity, merit _____/10

TOTAL _____

200

**Most earned per period (+25); most lost (+25)*

**Earned more than Mr. Claborn (+10)*

(note: cannot get both: 25 + 10 points. It's either or.....or neither ☺)

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