**Unit 1 GRASPS:** The Stock Market

**GOAL**:

You will present information on three stocks, advising a client to buy the stocks.

**ROLE**:

You are a financial adviser.

**AUDIENCE**:

Your target audience is your client, who does not know very much about the stock market.

**SITUATION**:

You and your colleagues have a meeting coming up with a client who wishes to invest $2,000 in the stock market. She wants to earn dividends on at least one of these stocks. Your team needs to prepare a report for your client with information about three stocks you recommend she buy within her budget of $2,000 with an explanation.

**PRODUCT PERFORMANCE**:

Your group will create a typed report for your client that includes all of the required components below. You need only one report per group.

**STANDARDS and CRITERIA for SUCCESS**:

Your report should include:

* Information on **three stocks** you recommend that your client buy (at least one of which pays dividends)
  + Company name
  + Stock market ticker symbol (the capital letter abbreviation for the stock)
  + Stock market data
    - Current stock price (provide the date you looked it up)
    - Net change from the previous day (in dollars and as a percentage)
    - Total investment recommended (# of shares, total price of shares)
    - 52 week high & low
  + Stock market data charts
    - Candlestick chart showing 5 years of stock price data (copy and paste from yahoo! Finance)
  + Simple moving averages
    - Line graph showing 5 years of stock price data using the 5-day simple moving average (copy and paste from yahoo! Finance)
  + Dividend income information
    - Current dividend rate & yield (provide the date you looked it up)
    - Expected annual dividend payment (based on current rate & yield)
  + Stock transaction fees using a 1.2% broker’s fee
* A written analysis/interpretation of the information above for each stock with the goal of persuasion to buy. Think about this question: *based on the information you found above, why is this a good stock to buy right now?*
* A bibliography of sources where you found your information