Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Period:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Stock Market Experience**

Welcome back to the Stock Market Experience simulation. You have now had an in depth look at investment options like stocks, bonds, and mutual funds. You have also learned about buying on margin and selling short, and have been introduced to limit and stop orders. You have the tools to make educated and safe investments in this simulation.

**Stocks:**

Your first investment will be in stocks. Many of you traded stocks last time in the Stock Market Experience, but with your deeper understanding we can make better researched and knowledgeable investments.

Using Yahoo Finance ( <http://finance.yahoo.com> ), you will research 6 different stocks from 3 different industries (tech, retail, sporting goods etc). Remember, diversifying a portfolio protects you from losses. Research companies that you know, performed well for you last time, or you have heard about in the news.

Company:

Industry:

|  |  |  |  |
| --- | --- | --- | --- |
| Symbol | Exchange | P/E Ratio | 52 Week High |
| 52 Week Low | EPS (Earnings Per Share) | Bid (Price You Sell) | Ask (Price You Buy) |
| Research (What is happening with this company currently): | | | |

Company:

Industry:

|  |  |  |  |
| --- | --- | --- | --- |
| Symbol | Exchange | P/E Ratio | 52 Week High |
| 52 Week Low | EPS (Earnings Per Share) | Bid (Price You Sell) | Ask (Price You Buy) |
| Research (What is happening with this company currently): | | | |

Company:

Industry:

|  |  |  |  |
| --- | --- | --- | --- |
| Symbol | Exchange | P/E Ratio | 52 Week High |
| 52 Week Low | EPS (Earnings Per Share) | Bid (Price You Sell) | Ask (Price You Buy) |
| Research (What is happening with this company currently): | | | |

Company:

Industry:

|  |  |  |  |
| --- | --- | --- | --- |
| Symbol | Exchange | P/E Ratio | 52 Week High |
| 52 Week Low | EPS (Earnings Per Share) | Bid (Price You Sell) | Ask (Price You Buy) |
| Research (What is happening with this company currently): | | | |

Company:

Industry:

|  |  |  |  |
| --- | --- | --- | --- |
| Symbol | Exchange | P/E Ratio | 52 Week High |
| 52 Week Low | EPS (Earnings Per Share) | Bid (Price You Sell) | Ask (Price You Buy) |
| Research (What is happening with this company currently): | | | |

Company:

Industry:

|  |  |  |  |
| --- | --- | --- | --- |
| Symbol | Exchange | P/E Ratio | 52 Week High |
| 52 Week Low | EPS (Earnings Per Share) | Bid (Price You Sell) | Ask (Price You Buy) |
| Research (What is happening with this company currently): | | | |

**Mutual Funds:**

Most investors have some sort of mutual fund in their portfolio. You will be required to have at least one mutual fund. It can be an index fund or an actively managed fund. You will be required to research 3 mutual funds before you decide which one to invest in.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Fund 1 | Fund 2 | Fund 3 |
| Fund Name |  |  |  |
| Fund Symbol |  |  |  |
| Fund Category |  |  |  |
| Fund Return  Year to Date YTD  3 Year Return  5 Year Return |  |  |  |
| Load? |  |  |  |
| 12b-1 Fee? |  |  |  |
| Which Mutual Fund fits your needs? Why?: | | | |

**Bonds:**

A well rounded portfolio will also have investments in bonds. You will research 2 corporate bonds and 2 government (treasury) bonds. You will choose one of each to invest in. On the SME website go to trade bonds, and then trading bonds help. On the help page click the first option “Available Bonds.” If you want to register for a free account on Moodys or Fidelity you can find the ratings, if not you can leave that section blank.

Corporate Bonds

|  |  |  |  |
| --- | --- | --- | --- |
| Issuer Name: | Coupon Rate: | Maturity (Expiration): | Rating: |
| Issuer Name: | Coupon Rate: | Maturity (Expiration): | Rating: |

Government Bonds

|  |  |  |  |
| --- | --- | --- | --- |
| Issuer Name: | Coupon Rate: | Maturity (Expiration): | Rating: |
| Issuer Name: | Coupon Rate: | Maturity (Expiration): | Rating: |