

# ECON Week 2 Assignment

## Circle your instructor

### Mr. Heffelfinger

Economics  
Period 1 or 3  
Assignment 2

### Mr. Sundquist

Economics  
Period 3 or 6  
Assignment 2

## Directions

This is a 4-week project that will be broken into weekly tasks leading up to managing an investment portfolio.

Week 1 – Introduction to investing

**Week 2 – Preparing for investing/Research/Sign up for Stock Market Challenge/Investing**

Week 3 – Investing/graphing and journaling your investments.

Week 4 – Monitoring your investments/graphing results

The second week (April 27-May 1) of work is as follows:

1. Stocks – We need you to research 5 primary stocks you are interested in investing in. Stocks are available in three different market places. Those would be the Dow Jones, New York Stock Exchange (NYSE) and NASDAQ. Each marketplace deals with different types of stocks/companies. We also want you to pick 5 alternatives (you DO NOT need the research for these yet). Please fill out the table at the end for each PRIMARY stock. When you are finished you will have 5 rows (one for each stock).
2. Sign up for the Stock Market Contest/Challenge on Monday, April 27, 2020 (investing opens April 29)
  - a. There are two ways to get users to register for your contest.
    - i. Follow the link: <https://www.howthemarketworks.com/register/184560>
    - ii. Register and Join: Ask them to Register to [howthemarketworks.com](https://www.howthemarketworks.com) and once they log-in, they can go to Join Contests, and look up your contest: West High 2020 Econ via the search bar.
  - b. The investing starts on 4/29/20@9:30am. Mr. Sundquist will monitor the activity daily and report to Mr. Heffelfinger as well how his students are doing. Mr. Sundquist will be added as a participant so if any of your feel up to the challenge and want to knock him off the top of the mountain he welcomes the challenge. Please make sure you read how the contest works on the website once you register.
3. *For those without digital access/internet you can find a newspaper (USA TODAY) and look in the Money section for your companies or email Mr. Sundquist ([dsundquist@tusd.net](mailto:dsundquist@tusd.net)) with your stock requests/ideas and he can work with you on the prices and various information. We know who got paper copies and those are the only ones allowed to request this type of assistance. Those of you with digital access we will work with you on where to find the information.*
4. Current event #2
  - i. Either read a newspaper (USA TODAY, Wall Street Journal, or New York Times) or watch the local news for Financial News. Pay attention to one story. You need to type a 1-page discussion of a current event and tie it to the stock market, for example – what impact did your story have on the stock market. The first paragraph must be summarizing the event IN YOUR OWN WORDS. The second paragraph must be an explanation of how this event had an effect on the stocks. Staple or cite the article to the back of your typed paper. The article must be from a reputable news source. You can watch the evening news as well when they discuss the financial news.

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If you have any questions during this project DO NOT hesitate to contact Mr. Sundquist or Mr. Heffelfinger. If you wait you may lose out on points.

You will want to access a real live stock market website, I would suggest using [finance.yahoo.com](http://finance.yahoo.com) or you can try on your smartphones the stock market App. The YAHOO website is what all my examples are based off of.

Please use this grid to complete part 1 of this week's work. As you type the boxes will get bigger. That is OK.

| Company Name | Symbol | Industry | Previous closing price | Is the current price trading up or down?<br>You can use the Percent or currency | 52-week range | What is their ESG Risk Rating | Top institutional holders of this stock |
|--------------|--------|----------|------------------------|---------------------------------------------------------------------------------|---------------|-------------------------------|-----------------------------------------|
|              |        |          |                        |                                                                                 |               |                               |                                         |
|              |        |          |                        |                                                                                 |               |                               |                                         |
|              |        |          |                        |                                                                                 |               |                               |                                         |
|              |        |          |                        |                                                                                 |               |                               |                                         |

I have provided an example below. I selected Hewlett Packard (the computer company) for the example. I have also provided the screen shots you will need and numbered where you can find the data for each. If you look at each heading it has a (#X) for where you will find that information on the screen shots I have provided.

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Use these screen shots as your example of WHAT information you must include.

Visit [finance.yahoo.com](https://finance.yahoo.com), towards the top middle you search for the company name you are interested in. The screen shot below is what will come up. I typed in Hewlett Packard in the search box on top of the screen and this is what comes up (minus the purple underlines and numbers). Now you will take your grid of the stock information provided and input the information numbered into the numbered box on the grid.

## EXAMPLE for Hewlett Packard

| Company Name (#1)                  | Symbol (#2) | Industry – (click on profile tab #3, I provided a screen shot of #3 below where the industry is located. | Previous Close - (#4) | Is the current price trading up or down? You can use the Percent or currency (#5) | 52-week range (#6) | What is their ESG Risk Rating (#7) | Top institutional holders of this stock (click on Holders #8) |
|------------------------------------|-------------|----------------------------------------------------------------------------------------------------------|-----------------------|-----------------------------------------------------------------------------------|--------------------|------------------------------------|---------------------------------------------------------------|
| Hewlett Packard Enterprise Company | HPE         | Communication Equipment                                                                                  | \$9.71                | down (-3.71% or -.36)                                                             | 7.43-17.59         | 17.2/Low                           | Vanguard Group                                                |

**Hewlett Packard Enterprise Company (HPE)**

9.36 -0.35 (-3.60%) 9.36 0.00 (0.00%)

At close: 4:02PM EDT After hours: 4:57PM EDT

Summary Company **5** Chart Conversations Statistics Historical Data **3** Profile Financials Analysis Options **8** Holders Sustainability

Previous Close **9.71** Market Cap **12.059B**

Open **4** 9.45 Beta (5Y Monthly) **1.53**

Bid 9.32 x 1100 PE Ratio (TTM) **10.49**

Ask 9.38 x 3200 EPS (TTM) **0.89**

Day's Range 9.27 - 9.75 Earnings Date **May 21, 2020 - May 25, 2020**

52 Week Range **7.43 - 17.59** Forward Dividend & Yield **0.48 (4.94%)**

Volume **6** 7,129,744 Ex-Dividend Date **Mar 10, 2020**

Avg. Volume 11,642,293 1y Target Est **12.69**

Fair Value **XX.XX** Undervalued

7% Est. Return

View details

Related Research

- Market Digest: HPE, MCD, VOD
- Analyst Report: Hewlett Packard...

View more

Chart Events

- Bearish pattern detected
- Fast Stochastic

View all chart patterns

Performance Outlook

- Short Term 2W - 6W
- Mid Term 6W - 9M
- Long Term 9M+

Trade prices are not sourced from all markets.

5G

The Stock Set to Dominate 5G

Stay ahead of volatile markets.

People Also Watch

| Symbol                    | Last Price | Change  | % Change |
|---------------------------|------------|---------|----------|
| <b>DXC</b>                | 15.07      | -0.26   | -1.70%   |
| DXC Technology Company    |            |         |          |
| <b>MFGP</b>               | 4.9300     | +0.2100 | +4.45%   |
| Micro Focus Intl PLC      |            |         |          |
| <b>HPQ</b>                | 15.36      | -0.16   | -1.03%   |
| HP Inc.                   |            |         |          |
| <b>PRSP</b>               | 20.30      | -0.04   | -0.20%   |
| Perspecta Inc.            |            |         |          |
| <b>KEYS</b>               | 95.31      | -0.53   | -0.55%   |
| Keyight Technologies Inc. |            |         |          |

**7** Total ESG Risk score > **17.2** Low 12th percentile

Earnings >

**Hewlett Packard Enterprise Declares a Regular Dividend**

Hewlett Packard Enterprise Declares a Regular Dividend

# ECON Week 2 Assignment

This is the screen for the PROFILE #3. The information is there with the arrows. However, look at their salaries.

**Hewlett Packard Enterprise Company (HPE)**  
NYSE - Nasdaq Real Time Price. Currency in USD

9.36 -0.35 (-3.60%) 9.42 +0.06 (0.64%)  
At close: 4:02PM EDT After hours: 5:09PM EDT

3

Summary Company Outlook Chart Conversations Statistics Historical Data **Profile** Financials Analysis Options Holders Sustainability

**Hewlett Packard Enterprise Company**  
6280 America Center Drive  
San Jose, CA 95002  
United States  
650-687-5817  
http://www.hpe.com

Sector: **Technology**  
Industry: **Communication Equipment**  
Full Time Employees: **61,600**

Why "5G Stocks" Will Skyrocket  
5G is on its way, and these stocks are set to soar

Stay ahead of volatile markets. yahoo! finance PREMIUM Try it free\*

**Key Executives**

| Name                                | Title                                                 | Pay   | Exercised | Year Born |
|-------------------------------------|-------------------------------------------------------|-------|-----------|-----------|
| Mr. Antonio Fabio Neri              | CEO, Pres & Director                                  | 3.41M | 7.49M     | 1967      |
| Mr. Tarek A. Robbiati M.B.A., M.Sc. | Exec. VP & CFO                                        | 2.73M | N/A       | 1965      |
| Mr. John F. Schultz                 | Exec. VP, Chief Legal & Admin. Officer and Corp. Sec. | 2M    | 7.49M     | 1964      |
| Mr. Alan Richard May                | Exec. VP & Chief People Officer                       | 1.53M | N/A       | 1958      |
| Mr. Philip A. Davis                 | Pres of Hybrid IT Bus. Group                          | 2.91M | N/A       | 1968      |

1 YEAR!

This is the Holders (#8) section screen. Only put the TOP holder in your worksheet.

**Hewlett Packard Enterprise Company (HPE)**  
NYSE - NYSE Delayed Price. Currency in USD

9.36 -0.35 (-3.60%) 9.36 0.00 (0.00%)  
At close: 4:02PM EDT After hours: 5:12PM EDT

8

Summary Company Outlook Chart Conversations Statistics Historical Data Profile Financials Analysis Options **Holdes** Su

5G Stocks Poised to Dominate  
These 3 companies are poised to dominate broadband and 5G wireless across the US. Breakthrough Investor

Major Holders Insider Roster Insider Transactions

**Major Holders Breakdown**

|        |                                       |
|--------|---------------------------------------|
| 0.25%  | % of Shares Held by All Insider       |
| 85.68% | % of Shares Held by Institutions      |
| 85.90% | % of Float Held by Institutions       |
| 1,122  | Number of Institutions Holding Shares |

**Top Institutional Holders**

| Holder                                   | Shares      | Date Reported | % Out  | Value         |
|------------------------------------------|-------------|---------------|--------|---------------|
| Vanguard Group, Inc. (The)               | 128,993,504 | Dec 30, 2019  | 10.01% | 2,045,678,373 |
| Dodge & Cox Inc                          | 126,581,925 | Dec 30, 2019  | 9.83%  | 2,007,589,330 |
| Blackrock Inc.                           | 99,154,681  | Dec 30, 2019  | 7.70%  | 1,572,593,240 |
| Primecap Management Company              | 84,438,741  | Dec 30, 2019  | 6.55%  | 1,339,198,432 |
| State Street Corporation                 | 65,820,461  | Dec 30, 2019  | 5.11%  | 1,043,912,511 |
| Hotchkis & Wiley Capital Management, LLC | 35,083,921  | Dec 30, 2019  | 2.72%  | 556,430,987   |
| Pzena Investment Management, LLC         | 34,075,382  | Dec 30, 2019  | 2.64%  | 540,435,558   |

5G: 202  
Stay a of vol. marke

People Als  
Symbol  
DXC  
DXC Technolog  
MFGP  
Micro Focus In  
HPO  
HP Inc.  
PRSP  
Perspecta Inc.  
KEYS

# ECON Week 2 Assignment

## Stock Market Score Sheet Week 2

\_\_\_/50 Stocks – 10 points for each stock/line completed.

\_\_\_/10 2nd Current Event

\_\_\_/3 points      ½ page summary of your article

\_\_\_/3 points      ½ page relating the article to the effect on the stock market.

\_\_\_/4 points      Cite or staple the article to your write up.