

## **Wizard of Wall Street Stock Market Project**

Over the past five weeks you have been given the opportunity to purchase stocks and get a taste of the serious risks and potential economic gain involved in stock trading. This stock trading exercise will culminate with the following project that includes a history of your transactions, company research, and personal reflection.

### **Project Requirements:**

#### **Part One: Cover Page**

**5 points**

Include your name, stock related graphics and original title.

#### **Part Two: Simulation Summary**

**15 points**

Use these questions to guide your two-page analysis:

- How did you pick your stocks?
- Did you purchase stock/commodities in a particular industry?
- Did you check 52 week/low and try to buy accordingly?
- Did price of the stock factor into your purchase?
- Which stock did you sell/hold/buy and why?
- Describe your overall success during the simulation.
- What accounted for the profit/loss?
- Was there a particular stock that gained a considerable amount?
- Did you modify your strategy as the simulation progressed?
- Did you make good or bad sells? (Check the sell price against the final day price and analyze.)
- How did your commodities perform?

\*Use specific numbers and percentages when analyzing.

**\*Simulation summary must be two pages and must be in paragraph form.**

#### **Part Three: Transaction Sheet(s)**

**25 points**

Each day is worth 5 points. Put them in order “Buy,” 1, 2, 3, “Sell”

#### **Part Four: Company Research**

**20 points**

Research one company that you kept in your portfolio for the entire simulation. Include the following for the company:

Use: [www.yahoo.com](http://www.yahoo.com) then click finance and enter your symbol.

1. Name, Address, and Phone Number of the business.
2. Summary of company and the products they produce/sell.
3. Number of employees.  
\*(1-3 Click profile - Cut and paste and make a new 1-page Word or PDF document).
4. List the top shareholders- Institutional, Mutual Fund, and Private/Major Direct.  
Click major holders- Just print this page: highlight the top holders please.
5. Attach historical prices of your stock throughout our simulation.  
Click historical price- Enter start date \_\_\_\_\_, click daily, click get prices
6. Print out a 1-year chart for your selected stock.  
Click interactive click comparison and add S&P 500, click 1yr, press print. This will print out a one-year comparison of your stock against the *S&P 500 Average*. If you do not have a color printer, use two different markers for your chart.

#### **Part Five: Personal Reflection**

**10 points**

Reflect on the Stock Market and stock trading in general.

- What did you learn about the Stock Market by completing the simulation, listening to classroom lecture/discussion, and completing the homework assignments? Refer to the “Buying Stock” shell and discuss any new concepts that you learned in Unit 2.
- When appropriate, will you participate in the Stock Market and why/why not?
- Add anything else that you would like, to close the report.

*\*This should be one full page and in paragraph form.*

This project is due \_\_\_\_\_, and is worth 75 points. Good Luck!