

TECHNOInvestor

A Senior Technology Project

Teacher Guide

For Microsoft 365

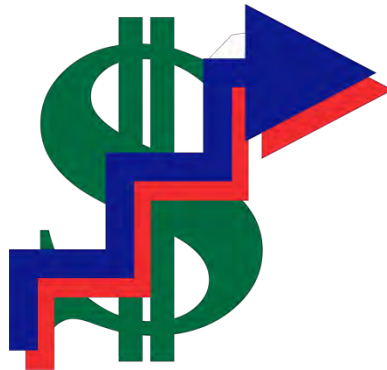


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Project Overview

Introduction to TechnoInvestor

In this project, students learn spreadsheet skills by assuming the role of a stockbroker working at an investment firm. There they buy and sell stocks to earn money for their client. They learn how the stock market functions by purchasing shares in companies listed on the TechnoStock Exchange (TSE). Students keep track of their investment portfolio using Microsoft Excel. The spreadsheet program allows them to organize their purchases and calculate their current value. Students then manipulate this information to create graphs that summarize stock values, display trendlines, and report earnings. Upon completion of this project, students produce an investor's report in Microsoft Word that contains detailed information about the financial status of the client.

Students complete the following tasks:

- In Session 1, students learn about the stock market and make an initial investment by purchasing shares in various companies listed on the TechnoStock Exchange (TSE). This information is recorded in a table created using Microsoft Excel and saved to a student folder.
- In Session 2, students read the first issue of Money and Markets; a newspaper that reports on business. Applying this information, they buy and sell shares. Once their financial transaction is complete, they enter the data into the Microsoft Excel table and manipulate the data using mathematical formulas.
- In Session 3, students read the second issue of Money and Markets and, based on the news, trade shares on the TSE. Afterwards they enter the trading information into the Microsoft Excel table. The information is further manipulated using conditional formatting so that earnings over the initial investment amount of 400 Technodollars are highlighted.
- In Session 4, students continue to invest in stocks listed on the TSE. Students begin by returning to their investment groups and reading the third issue of Money and Markets. After discussing the current events and how they have affected the stock values, students determine how they will proceed with their trade. They log their decisions in the Investment Record Trade 4 assignment before applying their knowledge of Microsoft Excel to prepare a new table to enter the information electronically. Students then graph the rise and fall of one stock and forecast its future value using a trendline.
- In Session 5, students make their final stock trade. They create a graph to summarize their earning history. They begin by joining their investment groups and reading the fourth issue of Money and Markets. Groups then discuss the current events that have occurred and the impact they have had on the companies listed on the TSE. Students decide on their final trade of this simulation and record their trades in the Investment Record Trade 5 assignment. Students ready their investment portfolio to include their latest transactions. They then create a graph that summarizes the earning history of their investment portfolio.
- In Session 6, students write a report to summarize the value of their investment portfolio. This report includes an explanation of earnings, current stock holdings, and recommendations for further financial growth.

This is a preview of the teacher guide.
Pages have been omitted.

SAMPLE

Assignment 3: Playing the Stock Market

Throughout this project, you participate in a simulation that replicates trading on the stock market. You assume the role of a broker working for an investment company. In small groups you invest 400 Technodollars in companies listed on the TechnoStock Exchange (TSE). At the beginning of each session, you read the articles printed in *Money and Markets*, a business magazine that caters to the leading companies listed on the TSE. With each issue of *Money and Markets* various events are published that have an impact on these companies. With stock values rising and falling, you must be wise investors to make money for your clients. If not, you could lose it ALL!



Materials

- Technodollars
- Stock Certificates
- Company Profiles
- TechnoStock Exchange Listings
- Scrap paper
- Calculators
- Pencils
- Envelopes

Setup

1. Form small groups of 4 or 5 students.

2. Obtain 400 Technodollars as listed in the table below.

Denomination		Quantity	Total Value
100	x	1	100
50	x	2	100
20	x	5	100
10	x	5	50
5	x	8	40
1	x	10	10

3. Acquire a calculator, scrap piece of paper and pencil.
TIP: Type "calculator" in the search box on the taskbar for the built-in Windows calculator.
4. The teacher will act as the floor broker responsible for managing the buying and selling of stocks on the TechnoStock Exchange (TSE). Therefore, he or she will need the remaining Technodollars and the TechnoStock certificates arranged on a table.

How to Play

5. Acquire a *Company Profiles* handout from the teacher.

- Read the information on each company to determine possible investments.

About the Company Profile:

TechnoAir Airlines

- TechnoAir Airlines is the fifth largest airline in the nation.
- Offers more than 2000 departures daily to 136 domestic and 92 international destinations.
- Operating hubs in Newark, Cleveland, and Guam.
- TechnoAir serves more international cities than any other carrier.
- Founded over 60 years ago by Ted Airport.
- Filed twice for bankruptcy protection and both times emerged with a successful plan for growth and profits.
- Stock value one year high **75 technodollars**
- Stock value one year low **29 technodollars**

One Year (52 week) View of TechnoAir Stock Value

This graph shows the value of the stock over 1 year (52 week) period. Examining the graph tells about the value of the stock.

Is it rising or falling?

Is it very volatile? Volatile means it has sharp increases or decreases over a short period of time.

Is the value constant? Constant means it keeps a similar value over time.

This means that over the past year the highest price of the stock was 75.

This means that over the past year the lowest price of the stock was 29.

- Acquire the *TechnoStock Exchange Listings* handout. This document contains information about the amount of money the companies listed are selling for on the TSE.

TechnoStock Exchange Listings

365 day high	365 day low	Stock	Symbol	Current Stock Value
29	14	Dream Cola	DC	20
62	27	Pats R Family	PRF	32
35	29	Kids Bank	KB	32
36	26	Pizza King	PK	28
29	75	TechnoAir	TA	63
68	37	TechnoMotor Company	TMC	47
39	4	Green Power	GP	11
34	15	Ruby Games	RG	20

- Use a calculator and scrap paper to plan which stocks to purchase.
- Assign a group member to purchase stocks from the floor broker (teacher).



10. Tell the floor broker the stocks your group would like to buy and then pay the appropriate amount of money.
11. The floor broker issues a stock certificate for each stock purchased. For example; if 3 stocks are purchased of Pizza King, then 3 separate TechnoStock certificates are issued.
12. Record group purchases. Refer to the *Investment Record Trade 1* assignment for this session.

Date:			
Name of Share	Number of Shares	Cost of Share	Total Stock Value
Name of Share: Enter the name of the company here.	Number of Shares: Enter the number of shares purchased.	Cost of Share: Enter the value when the stock was purchased.	Total Stock Value: For each company invested, multiply the number of shares by the cost, and place the value here.
Cash Available: Write how much money in cash remains after purchasing stocks.			
Cash Available			
Total Investment Portfolio Value			
Total Investment Portfolio Value: Add together the numbers in the <i>Total Stock Value</i> column with <i>Cash Available</i> to determine the <i>Total Investment Value</i> .			

13. After the market closes for the day, choose an investment group name. Write this name along with the names of group members, on the front of an envelope.
14. Place the purchased certificates and any remaining Technodollars inside the envelope and give to the teacher to keep until the next trade.

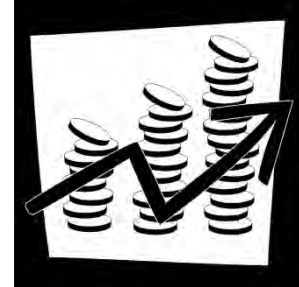
Assignment 4: Investment Record Trade 1

Record Trade 1

Record the trades made by your investment group in the chart below.

Include the following data:

- date
- name of the share purchased
- number of shares bought
- cost of share
- total value of stocks owned for each company
- amount of cash still on hand



Once complete, calculate the investment portfolio value by adding together the total stock values to the amount of cash.

Date:			
Name of Share	Number of Shares	Cost of Share	Total Stock Value
Cash Available			
Total Investment Portfolio Value			

Assignment 5: Organize Investment Information Using Excel

Follow the instructions to organize investment information in a table. Make the table look great using *Format as Table* - a set of preset styles or designs to format a range of cells.



Open Microsoft Excel

- ▷ Open *Microsoft Excel*. 
- ▷ Click *Blank workbook*.

Add Table Headings


- ▷ Select cell A1. Type *Investment Portfolio*.
- ▷ Select cell A3. Type *Date*.
- ▷ Press the TAB key. Cell B3 is now active. In this cell type *today's date*.
- ▷ Click to select cell A4. Type *Name of Share*.
- ▷ Press the TAB key. Cell B4 is now active. Type *Number of Shares*.
- ▷ Press the TAB key. Cell C4 is now active. Type *Cost of Share*.
- ▷ Press the TAB key again. Now cell D4 is active. Type *Total Stock Value*. Press ENTER.

	A	B	C	D	E
1	Investment Portfolio				
2					
3	Date	Nov. 3, 2021			
4	Name of Share	Number of Shares	Cost of Share	Total Stock Value	
5					

- ▷ To enlarge *column A* place the mouse pointer between column headings A and B.
- ▷ When the mouse pointer changes to a double arrow, double click the mouse button to automatically resize the column to the fit the cell contents.
- ▷ Repeat for columns B, C, and D.

	A	B	C	D
1	Investment Portfolio			
2				
3	Date	Nov. 3, 2021		
4	Name of Share	Number of Shares	Cost of Share	Total Stock Value
5				

Add Stock Names to Table

- ▷ Select cell A5. In this cell type the first company name **Dream Cola**.
- ▷ Press ENTER. Cell A6 is now active. Type **Pets R Family**.
- ▷ Repeat until each company name appears on the worksheet.
- ▷ Press ENTER.
Notice how column A is not wide enough to fit the information.
You need to resize the column.
- ▷ Position the mouse pointer between column heading A and B. 
- ▷ Double click the mouse to resize the column to automatically fit the cell contents.
The worksheet should look similar to this:

	A	B	C	D
1	Investment Portfolio			
2				
3	Date	Nov. 3, 2021		
4	Name of Share	Number of Shares	Cost of Share	Total Stock Value
5	Dream Cola			
6	Pets R Family			
7	Kids Bank			
8	Pizza King			
9	TechnoAir			
10	TechnoMotor Company			
11	Green Power			
12	Ruby Games			

Add Remaining Headings

- ▷ Select cell C13. Type **Cash Available**.
- ▷ Press ENTER. Cell C14 is now active. Type **Total Investment Portfolio Value**.
- ▷ Resize column C to fit the contents.


Enter Investment Data into the Table

Refer to the Investment Record Trade 1 handout to obtain trade results and financial data.

- ▷ Select cell B5.
- ▷ Type the number of shares purchased for Dream Cola. If no shares were purchased record 0 in the cell.
- ▷ Press ENTER and type the number of shares purchased for Pets R Family.
- ▷ Continue in this manner until an amount has been entered for each company.

- ▷ Refer to the *TechnoStock Exchange Listings* handout to enter the cost of each share into the table in the *Cost of Share* column.
- ▷ Now enter the total stock value. (*Multiply the number of shares by cost of share.*)
- ▷ If no shares were purchased for a company, then record **0** in the relative *Total Stock Value* cell.
- ▷ In cell D13 type the amount of cash remaining.
- ▷ In cell D14 type the total investment portfolio value, which is **400** Technodollars.

For the next trading session, the *total values* will be calculated using formulas.



	A	B	C	D
1	Investment Portfolio			
2				
3	Date	Nov. 3, 2021		
4	Name of Share	Number of Shares	Cost of Share	Total Stock Value
5	Dream Cola	5		20
6	Pets R Family	0		32
7	Kids Bank	0		32
8	Pizza King	3		28
9	TechnoAir	2		63
10	TechnoMotor Compan	0		47
11	Green Power	0		11
12	Ruby Games	0		20
13			Cash Available	90
14			Total Investment Portfolio Value	400

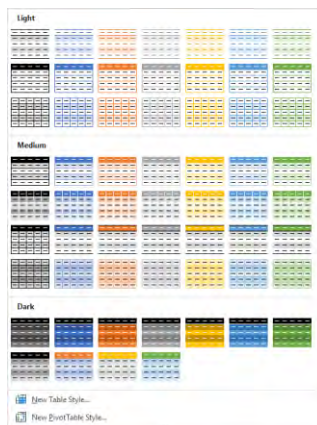
Dollar signs to show currency will be added in the next session.

Format the Table

- ▷ Select cell A4, hold down the SHIFT key, then select cell D14 to select the table.

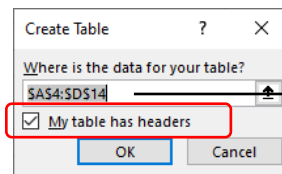


- ▷ From the *Home* tab, locate the *Styles* group and select *Format as Table*. 



- ▷ Click to select a style.

- ▶ The *Create Table* box opens displaying the range of selected cells. Click to select the *My table has headers* option and click *OK*.



Range of selected cells: A4 through D14.


Name of Shares	Number of Shares	Cost of Share	Total Stock Value
Dream Cola	5	20	100
Pets R Family	0	32	0
Kids Bank	0	32	0
Pizza King	3	28	84
TechnoAir	2	63	126
TechnoMotor Company	0	47	0
Green Power	0	11	0
Ruby Games	0	20	0
		Cash Available	90
		Total Investment Portfolio Value	400

The most important factor in choosing a style is to make the information clear and easy to understand.

The colors and styles are there to make the table look great but also to help the viewer read the words and numbers on the table easily.



Save the Investment Portfolio

- ▶ Click the *File* tab and select *Save*.
Go to the place where you save your work. (*Ask your teacher where to save your work.*)
- ▶ Click *New folder*.  Name the new folder *Investor*.
- ▶ Press *ENTER*.
- ▶ Select the new folder and click *Open*.
- ▶ In the *File name* box, type *Investment Portfolio*.
- ▶ Click *Save*.

Exit Microsoft Excel

Session 1 Review: Stock Market and Spreadsheet Checkup



Answer True (T) or False (F) to the following questions.

1. Stocks are items found in the storeroom of a grocery store. T or F
2. A stock is a type of investment that buys you a portion or share of a company. T or F
3. Money raised from selling ownership has to be paid back. T or F
4. When a stock is purchased, the company uses the money to help their business grow. T or F
5. Everyone who owns stocks in companies is rich. T or F
6. A broker's job is to buy stocks for you from the stock market. T or F
7. You can trade stocks by telephone, electronically, or speaking directly with your broker. T or F
8. Brokers work in places called stock markets. T or F
9. Whether a company makes or loses money has little or no effect on stock value. T or F
10. After you contact your broker, he or she contacts a floor broker. T or F

/10

Match the term to its correct definition.

- | | | | |
|---|---------------------|---|---|
| B | 11. Column Headings | A | The cell that is currently being worked in. |
| C | 12. Name Box | B | Headings that are labeled alphabetically. |
| D | 13. Row Headings | C | Displays the active cell. |
| A | 14. Active Cell | D | Headings that are labeled numerically. |
| F | 15. Range | E | Apply preset color schemes to format cells. |
| E | 16. Format as Table | F | A group of cells. |

/6

TOTAL: /16

Session 1 Extension Activity: Track the Stock Market on the Internet

Find out about different companies that sell stocks.

You will need:


- A web browser
- Microsoft Excel



Internet Research: About Stocks

1. Access the site <http://finance.yahoo.com/>. Use the symbol lookup feature to find the ticker symbols for the companies listed in the table below. Once you find the ticker symbol, fill in the table for each company.
2. In the last row of the table, select a company of your own choosing and complete the chart with its information.

TIP: If necessary, change the fractions to a decimal. For example, $25 \frac{3}{4} = \$25.75$.



Company Name	Ticker Symbol	Opening Price	Previous Close	52 Week High	52 Week Low
Apple Inc.					
Air Canada					
McDonald's Corp.					
Sony Group Corporation					
Microsoft Corporation					

3. Open Microsoft Excel and create a worksheet to track this information. Apply your knowledge to format the worksheet.
4. Save the workbook to your student folder as **Portfolio2**.

Questions about the Stock Market

1. What did you learn about how stocks change in price over time?

2. What problems, if any, did you encounter when trying to find the ticker symbol?

3. Which stock changed the most since the opening of the day's market?

This is a preview of the teacher guide.
Pages have been omitted.

SAMPLE

TechnoInvestor Marking Sheet

Report Appearance	
Information is easy to read. The report layout is attractive. The title and four headings have been formatted to stand out from the body of the report.	/3
Investment Information	
The <i>Investment Portfolio Holdings</i> lists the stocks held and their current values. <i>Investment Portfolio Value</i> details the total value of each stock, cash, and total portfolio value. <i>Earning History</i> explains the initial investment and how it has changed over the trading sessions. The <i>Total Investment Portfolio Value</i> bar graph is near the <i>Earning History</i> information. The graph has a title, axis labels, and bars showing the change in value for each of 5 sessions.	/5
Future Plans Information	
The text describes the tracking of the stock of a selected company. The <i>Trendline</i> line graph is on the same page as the <i>Plans for Future Investment</i> information. The graph has a title, axis labels, and a line showing the actual change over 4 trading sessions. A trendline shows the projected results over the next 2 trading sessions.	/4
Report Content	
The wording is clear. Investment information has been explained in detail. The report has no spelling or grammar errors.	/3
Comments:	
TOTAL:	/15

Money and Markets

•Business Newspaper

•Founded 1962

•Issue 1

TMC Announces Recall of Blaster SE

By Kevin Flash

The TechnoMotor Company (TMC) announces the recall of their popular sports utility vehicle the Blaster SE because the gas tank splits in rear end crashes, causing a giant fire to erupt. These firebombs are estimated to have claimed over 1,300 lives in the past three years. The former TMC Safety Engineer, Ron Secur, states that the company knew that the vehicle was unsafe

but would not spend the money to correct the design problem. As a result, TMC faces lawsuits that could force the company to pay millions in damages.



TechnoAir Offers Flat Beds to all Travelers

By Trevor Travel

TechnoAir is the only international airline to offer a seat that converts to a completely flat bed for all travelers. In an effort to lure passengers to the comfortable “lounge in the sky”, more than 200 million technodollars is being spent to create a place for travelers to sleep, work, or relax, when on the airplane.



The chair converts to a bed at the touch of a button. A comforting wrap around blanket and soft pillow make the sitting area into a bedroom. This layout offers privacy with a screen that can be opened or closed.

Green Power Announces Sunflower Biofuel

Green Power is exploring sunflower processing as a new potential source of affordable renewable energy.

By Charlotte Blue

Green Power has invested in 8000 acres of sunflower crops to process into biofuels. The high oil content in sunflowers has proved this plant to be a premium product in producing alternative fuels such as diesel. Each acre of sunflowers yields 35 to 80 gallons of oil. Sunflowers are a hardy crop, as they adapt well to variable weather and rainfall conditions and tend to resist pests. If the price of biofuel drops, the oil can be sold as a food oil as well.



Green Power's vice president, Jose Clima, states: "The increasing prices and shrinking resources of conventional fuels makes the sunflower biofuel a very attractive and affordable venture."

Kids Bank Reports Embezzlement

By Fred Theef

President of Kids Bank, Harry Crook has been charged with embezzlement. Crook has worked at Kids Bank for ten years, and TechnoPolice believe that over that time-period he stole millions of technodollars. By creating false computer entries, adjusting bank records, and overriding bank security he transferred large amounts of cash to off shore accounts.

TechnoPolice are investigating the crime. If charged Harry Crook could face 30 years in prison.



Dream Cola Introduces Two Holiday Drinks

By Rod Drinker

Dream Cola has introduced two new drinks for the holiday season; Cherry Blast and Fabulous Fireworks. Cherry Blast is a blend of cherry and cola. Fabulous Fireworks is a blend of carbonated juices that has a cranberry raspberry flavor. Both will be packaged in decorative glass bottles and should be on store shelves next month. Lola Festiv, a spokesperson for Dream Cola states that she anticipates sales on the new colas to greatly increase revenues for the already million-technodollar soft drink company.



John Roma is the Pizza King

By Pete Pepperony

John Roma is the founder of the national chain Pizza King. As a high school student, working at a local pizza pub, John dreamed of one day opening a pizza restaurant that served superior quality traditional pizza. In 1984, he sold his 1972 prized Camaro Z28 to purchase used restaurant equipment. Today he has more than 2500 restaurants in 10 countries with sales in the billions.



John Roma is the “king” of the pizza fast food industry

Ruby Games Announces MultiPlay Feature

By Ted Player

Ruby Games announced today that it is adding MultiPlay to all of its video games. MultiPlay is a feature that allows the user to pause a game on any device, and then resume playing on another device, regardless of its type or compatibility. Now you can begin a game on your computer, stop, then seamlessly pick up the action on any other device such as a tablet or cellphone. Ruby Games' cloud-based technology allows this unique feature to be available not only on new



games, but also to any existing Ruby Games products that customers have purchased. Gamers are calling MultiPlay the best new idea of the year.

Pets R Family Offers Training

Pets R Family Announces Training Classes to Complement its Full Service Pet Store Concept

By Sarah Retriever

Pets R Family has been traditionally known as a company that offers everything pets need. The company that began as a pet hospital and still boasts a veterinarian at every location now has a new service. A complete program of dog training classes, presented by expert instructors, will be available for clients and their four legged family members. Courses include: Puppy Basics, House Manners and Leash Walking, Solving Problems, and Advanced Behaviors and Tricks.



As an added bonus, customers can earn credits towards training classes each time they purchase food or pet supplies.

TechnoStock Exchange Stock Quotes



365 day high	365 day low	Stock	Symbol	Close	Current Stock Value
29	14	Dream Cola	DC	20	22
62	27	Pets R Family	PRF	32	35
35	19	Kids Bank	KB	32	26
39	26	Pizza King	PK	28	30
75	29	TechnoAir	TA	63	65
68	37	TechnoMotor Company	TMC	47	40
39	4	Green Power	GP	11	18
34	15	Ruby Games	RG	20	25

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