Write-Up Template

(Revised to reflect five-week assignment)

For full credit, please type out **(copy and paste)** each question and place before your answer. *Please format accordingly. If you don’t know how to format a Word document, do get some help.*Points will be taken off if I don’t see each question written out prior to your answer. More information will follow about how you will get this write-up to me. Check your email often. Thanks!

1. (10 points)
	1. What did you learn from this assignment?
	2. How would you describe the experience?
	3. What type of emotions, if any, did you feel during the assignment?
2. (10 points) For each of the six stocks you chose to purchase, discuss in detail the basis of your decision i.e., why you decided to purchase each stock. Elaborate in lots of detail. Carefully research each company and formulate a well-planned and thought out answer. The more you know about a company, the more you can also decide why the purchase made sense (or not)….
	1. Why you purchased stock A
	2. Why you purchased stock B
	3. Why you purchased stock C
	4. Why you purchased stock D
	5. Why you purchased stock E
	6. Why you purchased stock F
3. (10 points)
	1. What was the overall result (gain or loss) of each of your six stocks from the beginning of the assignment for each of the five weeks of the assignment? Simply record the gain and/or loss for each of your six stocks from 3/9 until 4/10.
	2. What was your expectation? On an ongoing basis, spend a lot of time thinking about this one.
	3. What would you do differently?
	4. What type of investor do you think you are? (Research different types of investors and see which one might match the type that you are).
	5. What type of investor do you aspire to be? Again, do research about different types of investment strategies and types of investors (active, passive, bargain hunter, retirement, etc). There is no right or wrong answer.
4. (35 points – each week is worth 7 points) Next, WEEKLY over the course of the five weeks (from March 9 to April 10) you will research news articles about each of the six companies you chose. Google has a “news” option whereby recent news events of a company search are listed. See www.buildequity.weebly.com for business news sites.

	1. For each of the five weeks (using the table/outline below), discuss all news events which occurred. **Please do not copy and paste news story titles.** Summarize **(in your own words)** the important news events of the week. I realize some weeks will have less news than other weeks. Don’t worry, but do try to choose a company that is “in the news!.” Do not stress. It’s not perfect. Nothing is.
5. (35 points – each week is worth 7 points) In your own words, please discuss the impact, if any, of each week’s news events on the price of each of your six stock picks. This part of the assignment is important. What are your thoughts?
	1. Did any of the news events have an impact on the price performance of each of your six stocks?
	2. Discuss (in detail) why or why not. *There is no right or wrong answer here – and what I am looking for is your own interpretation and thoughts.*

IMPORTANT: USE THIS TEMPLATE FOR THE WRITE-UP. PLEASE FORMAT ACCORDINGLY. FILL IT IN WITH 8 to 10 point FONT. IT WILL END UP BEING MANY PAGES. ***Please don’t use your own format. This format just makes it easier for me to read these. Thank you SO MUCH!***

**Week 1 -- 3/9/2020 – 3/13/2020:** *(These are sample stocks) Fill this in with your own stocks.
Question 4*

|  |  |
| --- | --- |
| Stock Price | *In your own words, summarize the news events of the week*  |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |

*Question 5*

|  |  |
| --- | --- |
| Stock Price | *In your opinion, the impact, if any, of the news event(s) on stock price* |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |

**Week 2 -- 3/16/2020 – 3/20/2020:**

*Question 4*

|  |  |
| --- | --- |
| Stock Price | *In your own words, summarize the weekly news events of the week* |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |

 *Question 5*

|  |  |
| --- | --- |
| Stock Price | *In your opinion, the impact, if any, of the weekly news event(s) on stock price* |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |

 **Week 3 -- 3/23/2020 – 3/27/2020:**

*Question 4*

|  |  |
| --- | --- |
| Stock Price | *In your own words, summarize the news events of the week* |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |

*Question 5*

|  |  |
| --- | --- |
| Stock Price | *In your opinion, the impact, if any, of the weekly news event(s) on stock price* |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |

 **Week 4 -- 3/30/2020 – 4/3/2020:**

*Question 4*

|  |  |
| --- | --- |
| Stock Price | *In your own words, summarize the news events of the week* |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |

*Question 5*

|  |  |
| --- | --- |
| Stock Price | *In your opinion, the impact, if any, of the weekly news event(s) on stock price* |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |

**Week 5 -- 4/6/2020 – 4/10/2020: (You may want to begin the write-up questions this week).**

*Question 4*

|  |  |
| --- | --- |
| Stock Price | *In your own words, summarize the news events of the week* |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |

*Question 5*

|  |  |
| --- | --- |
| Stock Price | *In your opinion, the impact, if any, of the weekly news event(s) on stock price* |
| Pepsi |  |
| IBM |  |
| Coca Cola |  |
| Nike |  |
| Tesla |  |
| Pfizer |  |