You may want at some time in your life to invest in stocks, bonds or mutual funds. You will want to make sure you do your research about the company you are about to invest in and to monitor how your investment is doing.

For this Assignment, you will be making an investment and follow it for the next six weeks. Each week you will look up your stock and enter the current market value. You should do this on the same day each week. The figures will be entered in sheet 7.1 of your workbook for each week.

# Scenario:

You are given $10,000 to make investments. You will spend all of the money for your investments. Pick the stock(s) you would like to follow and see how much money you earn over the next six weeks. This will end with the Discussion question for Unit 7 and you will see who earned the most money for the period.

To complete this Assignment:

* Research companies for stock purchase.
* Choose your stock.
* Enter name and symbol of the stock.
* Enter how many shares you purchased at what price.
* Make sure you enter the stock current market value on the same day each week.
* In the comments, if there was a change in the stock price, answer the following question: What could have contributed to the price change? (i.e., market went down.)

For this week you will complete the following in the AB104 Financial Plan Workbook. Detailed directions are provided in the AB104 Financial Plan Workbook Excel file.

* + 7.1 Stock Tracker

**The Risk Tolerance Test** will become a part of your financial plan, but does not need to be submitted. The test located at the link below will assist you in determining how you view risk and how you should invest your money. MS Money. (2017). *Test your risk tolerance*. Retrieved from http://www.msmoney.com/test-your-risk-tolerance/

Review the [**Final Proj ect Ti meline**](https://kapextmediassl-a.akamaihd.net/business/AB104/1901b/rubrics/final_timeline.docx), and the Rubric and [Privacy Statement](http://extmedia.kaplan.edu/business/AB104/AB104_1302C/Privacy.jpg) below before starting this Assignment.

# Directions for Submitting Your Assignment:

When you are ready to submit the Assignment, after you have saved the master file, save an additional copy as Username-AB104 Financial Plan Workbook-Unit#.xlsx (Example: TAllen- AB104 Financial Plan Workbook Unit 7.xlsx). Submit the file to the Unit 7: Assignment Dropbox by the end of Unit 7.

**AB104 Unit 7 Assignment Grading Rubric:**

| **Criteria:** | **Points Possible:****44** | **Points Earned:** |
| --- | --- | --- |
| **Content** (44 points) |  |  |
| * Section A-Initial Investment information
* Stock name/symbol
* Date
* Number of shares
* Purchase price
* Total amount invested
 | 8 |  |
| * Section B- Weekly Stock price
* Week #1
* Week #2
* Week #3
* Week #4
* Week #5
* Week #6
 | 18 |  |
| * Section C-Comment Section
* Weekly analysis of stock
 | 18 |  |
| **Total** | **44** |  |

**AB104: Privacy Statement**

One purpose of this course is to enable you to create your own personal financial plan. Any and all information you submit will be kept in the strictest confidence. The information will not be used for anything but grading purposes and no files with your personal information will be kept. If you are not comfortable using your current personal financial information, you can use projections of how you want your finances to look after graduation or use a multiplier to adjust the numbers.