

Unit 05: Basic Methods of Analyzing Stock

Content Area: **Business**
Course(s): **Investing**
Time Period: **4 weeks**
Length: **Weeks**
Status: **Published**

Unit Overview

Students will apply concepts of basic methods for analyzing stock.

Transfer

Students will be able to independently use their learning to better set and achieve their own short- and long-term financial goals.

Meaning

Understandings

Students will understand...

- The purpose of stock analysis.
- How to describe the elements and uses of Fundamental stock analysis.
- How to describe the elements and uses of Technical stock analysis.
- How to apply knowledge of stock investing to a stock market simulation game.

Essential Questions

Students will keep considering...

- How can analysis of stock improve the investment selection process?
- What is the purpose of stock analysis?

- How can I describe the elements and uses of fundamental stock analysis?
- What are the elements and uses of technical stock analysis?
- How can I apply my knowledge of stock investing to a stock market simulation game and assist my team?

Application of Knowledge and Skill

Students will know...

Students will know...

- Investing terms related to the basic methods for analyzing stock.
- Investing concepts and practices related to basic methods for analyzing stock.
- The purpose of stock analysis.
- The elements and uses of fundamental stock analysis.
- The elements and uses of technical stock analysis.
- How to apply their knowledge of stock investing to a stock market simulation game.

Students will be skilled at...

Students will be skilled at...

- Defining investing terms related to the basic methods for analyzing stock..
- Applying investing concepts and practices related to basic methods for analyzing stock.
- Proving the purpose of stock analysis.
- Applying and describe the elements and uses of fundamental stock analysis.
- Applying and describe the elements and uses of technical stock analysis.
- Applying knowledge of stock investing to a stock market simulation game.

Academic Vocabulary

Investing terms and concepts related to the basic methods of analyzing stock i.e. fundamental stock analysis, technical stock analysis, stock market simulation game, etc.

Learning Goal 1

SWBAT: Apply concepts of basic methods for analyzing stock.

- SWBAT: Apply concepts of basic methods for analyzing stock.

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| PFL.9.1.12.A.3 | Analyze the relationship between various careers and personal earning goals. |
| PFL.9.1.12.A.9 | Analyze how personal and cultural values impact spending and other financial decisions. |
| PFL.9.1.12.B.1 | Prioritize financial decisions by systematically considering alternatives and possible consequences. |
| PFL.9.1.12.B.6 | Design and utilize a simulated budget to monitor progress of financial plans. |
| PFL.9.1.12.D.1 | Calculate short- and long-term returns on various investments (e.g., stocks, bonds, mutual funds, IRAs, deferred pension plans, and so on). |
| PFL.9.1.12.D.2 | Assess the impact of inflation on economic decisions and lifestyles. |
| PFL.9.1.12.D.3 | Summarize how investing builds wealth and assists in meeting long- and short-term financial goals. |
| PFL.9.1.12.D.5 | Justify the use of savings and investment options to meet targeted goals. |
| PFL.9.1.12.D.6 | Analyze processes and vehicles for buying and selling investments. |
| PFL.9.1.12.D.7 | Explain the risk, return, and liquidity of various savings and investment alternatives. |
| PFL.9.1.12.D.9 | Relate savings and investment results to achievement of financial goals. |
| PFL.9.1.12.D.10 | Differentiate among various investment products and savings vehicles and how to use them most effectively. |
| PFL.9.1.12.D.11 | Assess the role of revenue-generating assets as mechanisms for accruing and managing wealth. |
| PFL.9.1.12.D.13 | Determine the impact of various market events on stock market prices and on other savings and investments. |
| PFL.9.1.12.D.15 | Analyze how savings, retirement plans, and other investment options help to shift current income for purposes of tax reporting and filing. |
| PFL.9.1.12.E.2 | Analyze and apply multiple sources of financial information when prioritizing financial decisions. |
| PFL.9.1.12.E.3 | Determine how objective, accurate, and current financial information affects the prioritization of financial decisions. |
| CAEP.9.2.12.C.9 | Analyze the correlation between personal and financial behavior and employability. |

Target 1

SWBAT: Prove the purpose of stock analysis.

- SWBAT: Prove the purpose of stock analysis.

Target 2

SWBAT: Apply and describe the elements and uses of fundamental stock analysis.

- SWBAT: Apply and describe the elements and uses of fundamental stock analysis.

Target 3

SWBAT: Apply and describe the elements and uses of technical stock analysis.

- SWBAT: Apply and describe the elements and uses of technical stock analysis.

Target 4

SWBAT: Apply knowledge of stock investing to a stock market simulation game.

- SWBAT: Apply knowledge of stock investing to a stock market simulation game.

Summative Assessment

- Unit Test

Formative Assessment and Performance Opportunities

- Class Discussion
- Completion of Vocab
- Presentation of Ideas
- Review of worksheets/projects
- Teacher Observation
- Use of technological resources for quick assessment

Accommodations/Modifications

- Collaborate in small groups organized by student level and preference to apply basic methods of analyzing stock
- Extra problems for extra practice remediation and/or enrichment

- Quizlet

Unit Resources

- Board Games
- Book Companion Website
- Chapter PowerPoints
- DECA Role Plays
- Desktop Computer
- Document Camera
- Guest Speakers
- Managing Your Personal Finances 6E
- Microsoft Excel
- Videos
- Wall Street Journal & other business publications
- Workbook

Interdisciplinary Connections

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| MA.K-12.1 | Make sense of problems and persevere in solving them. |
| LA.RST.11-12.9 | Synthesize information from a range of sources (e.g., texts, experiments, simulations) into a coherent understanding of a process, phenomenon, or concept, resolving conflicting information when possible. |
| MA.S-MD.A | Calculate expected values and use them to solve problems |
| LA.WHST.11-12.4 | Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. |
| MA.S-MD.B.5b | Evaluate and compare strategies on the basis of expected values. |