

# Stock Portfolio Project Example

Go to [finance.yahoo.com](http://finance.yahoo.com)  
 Type in the name of a stock and click on search.  
 This will appear →  
 Use this panel to fill in boxes 1 through 8.

**Apple Inc (AAPL)**  
NasdaqGS - NasdaqGS Real Time Price. Currency in USD ★ Add to watch

**149.77** +0.21 (+0.14%)  
As of 2:09PM EDT. Market open.

**Summary**   Conversations   Statistics   Profile   Financials

|                |                 |                  |              |
|----------------|-----------------|------------------|--------------|
| Previous Close | 149.56          | Market Cap       | 781.346B     |
| Open           | 149.20          | Beta             | 1.43         |
| Bid            | 149.83 x 400    | PE Ratio (TTM)   | 17.58        |
| Ask            | 149.84 x 300    | EPS (TTM)        | 8.52         |
| Day's Range    | 148.67 - 150.02 | Earnings Date    | Aug 1, 2017  |
| 52 Week Range  | 96.42 - 156.65  | Dividend & Yield | 2.52 (1.69%) |
| Volume         | 11,846,634      | Ex-Dividend Date | 2017-05-11   |
| Avg. Volume    | 27,233,911      | 1y Target Est    | 159.13       |

Box #9: Price 1 Year Ago:  
 To get the price one year ago click on the **1Y** at the top of the interactive chart. Then put your cursor at the top of the first bar:



To fill in boxes 10 through 13:

**Example** Tbill Rate: 1.22 **Example** Market Risk: 5.75 **THESE ARE EXAMPLE NUMBERS ONLY!**

|  |          |  |              |   |                   |  |  |
|--|----------|--|--------------|---|-------------------|--|--|
| Stock #1   |          | 1. Company:  |              |   |                   | 2. Ticker:   |  |
| 3. Buy Price:  | 4. Beta: | 5. PE Ratio:   | 6. Dividend: | 7. Div. Yield:  | 8. 1Y Target Est: | 9. Price 1 Year Ago:   |  |
| 10. Last year % Change =<br>$\frac{\#3 - \#9}{\#9} \times 100 =$ |          | 11. Required Rate of Return =<br>Tbill + (#4 x Risk) |              | 12. ACY =<br>$\frac{\#6 + \frac{\#8 - \#3}{1}}{\frac{\#8 + \#3}{2}} \times 100$ |                   | 13. Why Buy?<br><b>ACY ≥ RRR</b><br><b>OR</b><br><b>*Example reason:</b> It is projected to earn only 7.7% next year which is below my required rate of 9.4%. I will buy this stock anyway because I love Apple and want to own a piece of it. |  |

\*Only one stock can be an emotional purchase. All others must meet the requirement of  $ACY \geq RRR$ .

## Quantity Purchased (On Transaction Journal):

To determine (how many shares of a stock to buy):

1. Determine how much you want to spend on the stock.      Example: \$10,000.00
2. Divide that by the price of the stock.      Ex:  $10,000 / 149.77 = 66.769$
3. Round **DOWN!**      Ex: Buy 66 shares