

# 37

## Stocks

### New Skills

1. Format cells to negative numbers.
2. Change a cell's fill color.

### Activity Overview

**S**tocks are the basic units of ownership in publicly traded companies. Getting started in investing in stocks requires a lot of research and a fundamental knowledge of how the stock market works. The Internet offers a wealth of information about investing, and local community schools frequently offer inexpensive or free stock market investing courses and workshops. It's tempting to jump right into the action, but because of the risk involved, an investor really needs to do the homework. With sound decisions based on knowledge and research, an investor's chance of success in the stock market is greatly increased.

The following activity illustrates how spreadsheets can be used to determine an investor's gains or losses from the purchase and sale of stocks.

### Instructions

1. Create a NEW spreadsheet.
- ★ *Unless otherwise stated, the font should be 10 point Arial.*
2. Type the data as shown.
3. Format the width of columns A and C to 26.0 and left align.
4. Format the width of column B to 8.0 and left align.
5. Format the width of columns D – J to 12.0 and right align.
6. Format cells D4 – D18 as numbers displaying 0 decimal places with a comma separator.
7. Format cells E4 – I20 as numbers displaying 2 decimal places with a comma separator. Set the negative numbers to red and to display parentheses.
8. Format cells J4 – J18 as percentages displaying 2 decimal places.
9. Bold rows 1, 2, and 20.
10. Underline row 2.
11. Compute the formulas for the first stock as follows:
  - a. PURCHASE VALUE=NUMBER OF SHARES\*PURCHASE PRICE → In cell F4, type =D4\*E4
  - b. SELLING VALUE=NUMBER OF SHARES\*SELLING PRICE → In cell H4, type =D4\*G4
  - c. \$ GAIN/LOSS=SELLING VALUE-PURCHASE VALUE → In cell I4, type =H4-F4
  - d. % GAIN/LOSS=\$ GAIN/LOSS / PURCHASE VALUE → In cell J4, type I4/F4
12. Use the AutoFill feature to copy the formulas down for the remaining stocks.

**NEW SKILL**



# 13 → #22 on back →



13. Position the cursor in cell F20 and use the AutoSum button on the standard toolbar to sum cells F4 – F18. Repeat this procedure in cell H20 to sum cells H4 – H18 and in cell I20 to sum cells I4 – I18.

**NEW SKILL**

14. Change the fill color for cells F1 – F20 and H1 – H20 to yellow.

15. Change the fill color for cells I1 – I20 and J1 – J20 to light green.

16. Insert a header that shows:

a. Left Section      Activity 37: Student Name

b. Center Section    STOCKS

c. Right Section     Current Date

17. Insert a footer that shows:

a. Center Section    PAGE number

18. Carefully proofread your work for accuracy.

19. Save the spreadsheet as STOCKS.

20. Analyze the changes made to the data in the spreadsheet.

21. Set the Print Area to include all cells containing data in the spreadsheet.

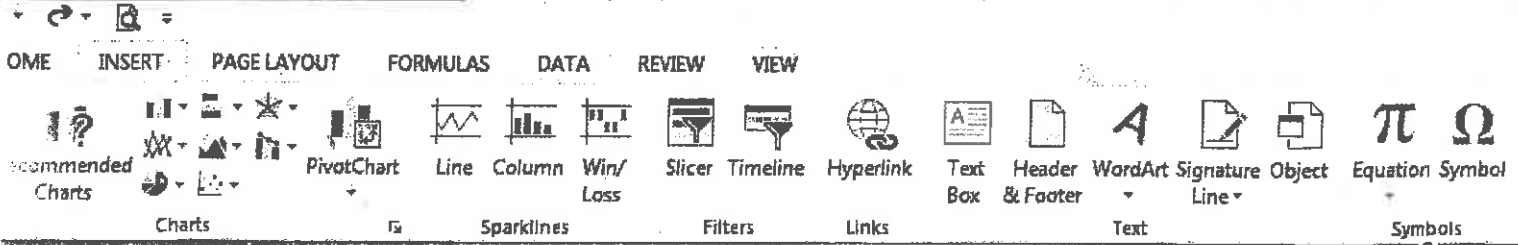
22. Print Preview and adjust the Page Setup so that the spreadsheet fits on one page. Set the page orientation to Landscape.

	A	B	C	D	E	F	G	H	I	J
	COMPANY	TICKER SYMBOL	INDUSTRY	NUMBER OF SHARES	PURCHASE PRICE	PURCHASE VALUE	SELLING PRICE	SELLING VALUE	\$ GAIN/LOSS	% GAIN/LOSS
4	3M Company	MMM	Diversified Company	1750	61.50	88.15				
5	American Express	AXP	Financial Services	1200	52.80	44.08				
6	AT&T, Inc.	T	Telecommunications Services	1600	44.11	27.93				
7	Boeing	BA	Aerospace/Defense	3200	38.27	63.42				
8	Caterpillar, Inc.	CAT	Machinery	1500	21.52	79.34				
9	Coca-Cola	KO	Beverage	1425	57.96	60.34				
10	Disney (Walt)	DIS	Entertainment	1580	13.54	36.11				
11	General Electric	GE	Diversified Company	1675	21.42	17.19				
12	Hewlett-Packard	HPQ	Computers/Peripherals	4000	16.17	41.62				
13	Home Depot	HD	Retail Building Supply	1750	69.85	30.91				
14	International Business Machines	IBM	Computers/Peripherals	800	54.13	134.89				
15	Kraft Foods	KFT	Food Processing	1820	26.38	31.45				
16	McDonald's Corp.	MCD	Restaurant	3005	15.22	72.72				
17	Microsoft Corp.	MSFT	Computer Software/Services	1025	60.18	25.07				
18	Wal-Mart Stores	WMT	Retail Store	1800	43.79	54.56				
19										
20	TOTALS									

INPUT DATA

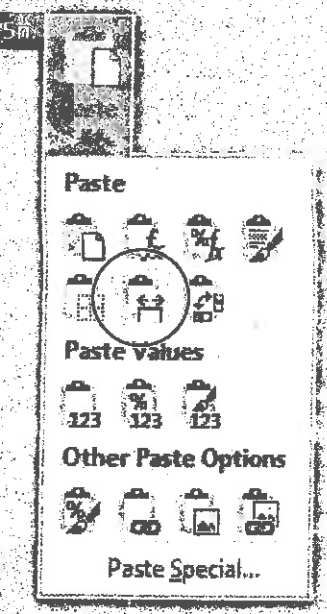
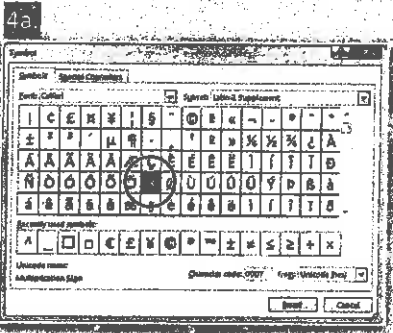
Stocks





## Instructions

1. Using Microsoft Excel 2013, create a new Blank workbook.
2. Save the file as *5.6 Flash Cards* in your **My Excel Projects** folder.
3. Key the data as shown in *5.6 Source Doc. A*.
4. From the **INSERT** tab, **Symbols** group, do the following:
  - a. Insert the **Multiplication** sign in cell B3, then copy and paste it in cells B4 through B12
  - b. Insert the **Equal** sign in cell D3, then hit Enter. Then copy and paste the equal sign in cells D4 through D12
  - c. Insert the **Less-Than** sign in cell B15, then copy and paste it in cells B16 through B19
  - d. Insert the **Greater-Than** sign in cell B22, then copy and paste it in cells B23 through B26
5. Make the following formatting changes:
  - a. Change the font size of row 1 to 24
  - b. Merge and center cells A1 through E1
  - c. Change the font size of rows 3 through 26 to 20
  - d. Change the width of columns A through E to 15
  - e. Center align cells A3 through E26
  - f. Apply All Borders to cells A3 through E12
  - g. Apply All Borders to cells A15 through C19
  - h. Apply All Borders to cells A22 through C26
  - i. Change the name of Sheet 1 to [3 Facts]
  - j. Insert a new Sheet
  - k. Move the new Sheet to the end
  - l. Change the name of Sheet 2 to [4 Facts]
  - m. Copy the data from the [3 Facts] Sheet
  - n. Using the **Keep Source Column Widths** option in the Paste drop-down menu, paste the data into the [4 Facts] Sheet
    - o. Now, key the data in *5.6 Source Doc. B* to replace the data in the [4 Facts] Sheet
6. Proofread your work for accuracy and format, then resave the file.
7. Select all cells containing data in each worksheet and Print Preview your worksheets.
8. Your worksheets should look similar to *5.6 Source Docs. C and D*.
9. Print the entire workbook if required.



5.6 Source Doc. A

	A	B	C	D	E
1	Math Facts - 3's				
2					
3	3		1		3
4	3		2		6
5	3		3		9
6	3		4		12
7	3		5		15
8	3		6		18
9	3		7		21
10	3		8		24
11	3		9		27
12	3		10		30
13					
14					
15	3		6		
16	24		27		
17	15		18		
18	12		15		
19	6		9		
20					
21					
22	30		27		
23	21		18		
24	6		3		
25	18		15		
26	24		21		

5.6 Source Doc. B

	A	B	C	D	E
1	Math Facts - 4's				
2					
3	4		1		4
4	4		2		8
5	4		3		12
6	4		4		16
7	4		5		20
8	4		6		24
9	4		7		28
10	4		8		32
11	4		9		36
12	4		10		40
13					
14					
15	4		8		
16	28		32		
17	16		20		
18	12		16		
19	8		12		
20					
21					
22	32		28		
23	20		16		
24	8		4		
25	16		12		
26	36		32		

5.6 Source Doc. C

Example of Finished Source Doc. A

Math Facts - 3's

3	×	1	=	3
3	×	2	=	6
3	×	3	=	9
3	×	4	=	12
3	×	5	=	15
3	×	6	=	18
3	×	7	=	21
3	×	8	=	24
3	×	9	=	27
3	×	10	=	30

3	<	6
24	<	27
15	<	18
12	<	15
6	<	9

30	>	27
21	>	18
6	>	3
18	>	15
24	>	21