**Student Name:** Hunter Black\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Instructor:** Shana Stanton **Date:** 2/5/16

**Instructions:** Follow the instructions on the STARS 1 Instruction sheet. Use this form as you research and purchase 10 companies for your STARS portfolio in Google Finance. **Complete the chart below with the information from your initial portfolio. Fields outlined in red are required. If a value is not available, use n/a. Keep a copy of this information for your STARS 3 Final Project.**

# **Portfolio Name:** Hunter.Black-Spring2016

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Company Name** | **Ticker**  **Symbol** | **Sector/Industry** | **Date Purchased** | **# of Shares** | **Cost per Share** | **Market Cap** | **Beta** | **EPS** | **P/E** | **(Net)**  **Profit Margin** | **ROE** | **Why did you purchase stock in this company?** |
| 1. Goldcorp Inc | **GG** | Gold | 2/4/16 | 3500 | $13.75 | 11.13B | 0.39 | -2.90 | N/A |  |  | * Gold is a stable commodity * Low Beta |
| 2. 3D Systems Corp. | **DDD** | 3D Printing/products | 2/4/16 | 1000 | $8.95 | 1.08B | 1.55 | -0.51 | N/A |  |  | * 3D Printing tech rising * Low Price to buy |
| 3. Tiffany & Co. | **TIF** | Jewelry | 2/4/16 | 500 | $63.86 | 8.27B | 1.97 | 3.83 | 16.75 |  |  | * Valentine’s day soon * High-risk big payoff possible |
| 4. Boeing Co. | **BA** | Aviation | 2/4/16 | 750 | $122.56 | 81.58B | 1.11 | 7.44 | 16.44 |  |  | * Brother works for Boeing * Have upcoming business deals |
| 5. Twitter Inc. | **TWTR** | Social Media | 2/4/16 | 750 | $15.72 | 11.04B | N/A | -0.86 | N/A |  |  | * I use Twitter everyday * Price low |
| 6. Apple Inc. | **AAPL** | Technology | 2/4/16 | 1000 | $94.02 | 528.54B | 0.97 | 9.41 | 10.13 |  |  | * Confident in their products * iPhone 7 coming soon |
| 7. Microsoft Corporation | **MSFT** | Technology | 2/4/16 | 500 | $50.16 | 407.11B | 0.92 | 1.40 | 36.09 |  |  | * Use their products everyday * High P/E |
| 8. Tyson Foods Inc | **TSN** | Food/Consumer Goods | 2/5/16 | 1000 | $57.10 | 18.28B | 0.40 | 2.95 | 19.29 |  |  | * Growing rapidly * Low price, low beta |
| 9. Verizon Communications | **VZ** | Telecommunications | 2/5/16 | 1500 | $50.95 | 207.02B | 0.22 | 4.37 | 11.65 |  |  | * Very low beta * Know many who use them |
| 10. Starbucks Corporation | **SBUX** | Consumer Goods/Coffee | 2/4/16 | 500 | $54.49 | 84.78B | 0.77 | 1.63 | 33.86 |  |  | * Drink Starbucks everyday * Starbucks evenings coming |

**Create two realistic Investment Portfolio Goals. Goals should be specific and measurable.** e.g. Increase my portfolio’s value by 7%, Invest in two socially responsible and profitable companies

1. Increase portfolio’s value by at least 10%

2. Monitor stocks and buy/sell at least twice a week

STARS 1 - Worksheet A 8/12/15 Note: List your goals here as you will need them for STARS Assignment 1 and for the STARS Final Project.