HITA: Portfolio Management Applications

Term Project

UNLV MIS 764

Written By:

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Introduction

Introduce HITA, Harmonious Information Technology Affordances

Current Measurement Techniques

Find paper where HITA is first Introduced   
  
Find paper where HITA or Organizational HITA is measured.

Probably the U-shaped non-liner paper in the title

Explain measurement techniques used in paper.

Develop an alternative way to measure HITA using a company’s publicly available financial statements.

Motivation

Develop a way to integrate HITA into investment decisions as an additional variable for portfolio management applications.

Literature

Importance

Theory

Conceptualization

Selection

Randomly Selected

395 Packaging Corp of America PKG

Revenue: 7,802,000,000

Intangible: 1,154,000,000

9 Eli Lilly & Co. LLY

Revenue: 34,124,000,000

Intangible: 11,846,000,000

443 The J.M. Smucker Company SJM

Revenue: 8,529,000,000

Intangibles: 9,646,000,000

156 Air Products & Chemicals, Inc. APD

Revenue: 12,600,000,000

Intangibles: 01,196,000,000

49 Pfizer Inc. PFE

Revenue: 061,996,000,000

Intangibles: 132,683,000,000

40 Abbott Laboratories ABT

Revenue: 40,109,000,000

Intangibles: 32,494,000,000

463 C.H. Robinson Worldwide, Inc. CHRW

Revenue: 17,596,000,000

Intangibles: 01,620,000,000

18 Johnson & Johnson JNJ

Revenue: 85,159,000,000

Intangibles: 70,733,000,000

368 Hologic Inc HOLX

Revenue: 4,030,000,000

Intangibles: 4,170,000,000

190 Metlife, Inc. MET

Revenue: 66,905,000,000

Intangibles: 11,793,000,000

300 Dollar Tree Inc. DLTR

Revenue: 30,604,000,000

Intangibles: 03,064,000,000

Criteria Based Selection

Energy: CVX CHEVRON CORP

Revenue:

Intangibles:

Materials: LIN LINDE PLC

Revenue:

Intangibles:

Industrials: CAT CATERPILLAR INC

Revenue:

Intangibles:

Con. Disc.: AMZN AMAZON.COM INC

Revenue:

Intangibles:

Con. Stap.: WMT WALMART INC

Revenue:

Intangibles:

Health Care: NVO NOVO NORDISK A/S

Revenue:

Intangibles:

Financials: JPM JPMORGAN CHASE & CO

Revenue:

Intangibles:

Info. Tech.: MSFT MICROSOFT CORP

Revenue:

Intangibles:

Comm. Serv.: META META PLATFORMS INC

Revenue:

Intangibles:

Utilities: NEE NEXTERA ENERGY INC

Revenue:

Intangibles:

Real Estate: PLD PROLOGIS INC

Revenue:

Intangibles:

Compare Intangible Assets and Revenue

13 Exxon Mobil Corporation XOM

Revenue:

Intangibles:

Also removed for a new randomly selected company

335 Coterra Energy Inc. CTRA had to be replaced with a new, randomly selected company, they didn’t have any listed

Revenue per employee

Reason for using intangible assets

It’s not easy to determine how much of a balance sheet is IT related

IT assets would be part of plant, property, and equipment, but a more granular

Breakdown may take more

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