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 (Large Cap Index)

Energy: CVX CHEVRON CORP

Revenue: 196,913,000,000

Intangibles: 004,722,000,000

Materials: LIN LINDE PLC

Revenue: 32,854,000,000

Intangibles: 39,150,000,000

Industrials: CAT CATERPILLAR INC

Revenue: 67,060,000,000

Intangibles: 005,872,000,000

Con. Disc.: AMZN AMAZON.COM INC

Revenue: 574,785,000,000

Intangibles: 030,476,000,000

Con. Stap.: WMT WALMART INC

Revenue: 645,737,000,000

Intangibles: 032,213,000,000

Health Care: NVO NOVO NORDISK A/S

Revenue: 34,445,000,000

Intangibles: 08,958,000,000

Financials: JPM JPMORGAN CHASE & CO

Revenue: 236,311,000,000

Intangibles: 064,381,000,000

Info. Tech.: MSFT MICROSOFT CORP

Revenue: 211,915,000,000

Intangibles: 077,252,000,000

Comm. Serv.: META META PLATFORMS INC

Revenue: 134,902,000,000

Intangibles: 021,442,000,000

Utilities: NEE NEXTERA ENERGY INC

Revenue: 28,114,000,000

Intangibles: 06,783,000,000

Real Estate: PLD PROLOGIS INC

Revenue: 8,428,000,000

Intangibles: 1,950,000,000

Criteria Based Selection (Small Cap)

Energy: SUN SUNOCO LP

Revenue: 23,068,000,000

Intangibles: 02,143,000,000

Materials: ATR APTARGROUP INC.

Revenue: 3,487,000,000

Intangibles: 1,247,000,000

Industrials: HII HUNTINGTON INGALLS INDUSTRIES INC

Revenue: 11,454,000,000

Intangibles: 03,509,000,000

Con. Disc.:

Revenue:

Intangibles:

Con. Stap.:

Revenue:

Intangibles:

Health Care:

Revenue:

Intangibles:

Financials:

Revenue:

Intangibles:

Info. Tech.:

Revenue:

Intangibles:

Comm. Serv.:

Revenue:

Intangibles:

Utilities:

Revenue:

Intangibles:

Real Estate:

Revenue:

Intangibles:

Compare Intangible Assets and Revenue

Random Selection Removals

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

Criteria Based Selection Removals

Energy: CVX was selected over XOM due to issues with XOM during the random selection process

Industrials: LTMAY was not selected because it is not traded on either the NASDAQ or NYSE

GE was not selected due to recent restructuring

Health Care: LLY was not selected because it already appears in the randomly selected group

NVO was selected over UNH in an effort to include international companies in the selection process.

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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