HITA: Portfolio Management Applications

Term Project

UNLV MIS 764

Written By:

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**Due:** May 5th, 2024

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:

Intangibles:

190 Metlife, Inc. MET

Revenue:

Intangibles:

300 Dollar Tree Inc. DLTR

Revenue:

Intangibles:

Criteria Based Selection

Energy: CVX CHEVRON CORP

Materials: LIN LINDE PLC

Industrials: CAT CATERPILLAR INC

Con. Disc.: AMZN AMAZON.COM INC

Con. Stap.: WMT WALMART INC

Health Care: NVO NOVO NORDISK A/S

Financials: JPM JPMORGAN CHASE & CO

Info. Tech.: MSFT MICROSOFT CORP

Comm. Serv.: META META PLATFORMS INC

Utilities: NEE NEXTERA ENERGY INC

Real Estate: PLD PROLOGIS INC

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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