

Oxford Area School District **Investing and the Stock Market** Scope and Sequence –  
Quarter 1:

**Grade Level 11-12**

**Companies and  
the Stock Market**

- **Different business structures of companies and how they relate to the operation of the stock market.**
  - What are the components of different types of companies?
  - What is a stock?
  - What is investing and what is trading?
  - How do you identify Ticker Symbols and Interpret Stock Quotes
  - How are indexes used to measure and compare performance?

**The Stock Market  
and Identification  
of Investments**

- **How to pick a profitable stock while keeping investments diversified.**
  - What is diversification?
  - How to research stocks?
  - What is risk?
  - What is a bond?
  - What is a dividend?
  - What is capital gains and how is it calculated?

Oxford Area School District **Investing and the Stock Market** Scope and Sequence –  
Quarter 2:

**Grade Level 11-12**

**Corporate/Economic  
Data and  
Buy/Sell/Hold**

- **Causes of Stock Market changes and when to buy/sell/hold to keep healthy and diverse portfolios.**
  - What causes stock prices to change?
  - What is buy, sell, and hold in stock trading?
  - How are indexes used to measure and compare performance?

**Portfolio Analysis  
and Investment  
Strategy**

- **Evaluation and explanation of investment strategies and the success of the diversity and profitability of investment portfolios.**
  - How do you calculate the profitability of an investment portfolio?
  - How does capital gains relate to the sale of stock?
  - How did analyzing economic data help in picking stocks with high profits?
  - What investment strategies have I learned to help in future purchase of stock?

Unit 1: Companies and the Stock Market			
Big Idea: Different business structures of companies and how they relate to the operation of the stock market.			
<b>Standard:</b> <b><u>BCIT - Finance and Economics</u></b> <b>15.6.12.R.</b> <b>Compare and contrast various investment plans to achieve goals of liquidity, income, and growth.</b> <b><u>Economics</u></b> <b>6.5 Work and Earnings</b> <b>G. Analyze the risks and returns of various investments</b>		<b>Essential Questions:</b> <ul style="list-style-type: none"> <li>• What are the components of different types of companies?</li> <li>• What is a stock?</li> <li>• What is investing and what is trading?</li> <li>• How do you identify Ticker Symbols and Interpret Stock Quotes?</li> <li>• How are indexes used to measure and compare performance?</li> </ul>	
Eligible Content	Competencies	Resources	Assessments
<ul style="list-style-type: none"> <li>• Concepts of the different types of companies.</li> <li>• Private to public companies</li> <li>• Trading venues and ticker symbols</li> </ul>	<ul style="list-style-type: none"> <li>• Identify and describe the terms: company, partnership, and corporation.</li> <li>• Explain the characteristics, advantages, and disadvantages of various types of companies.</li> <li>• Explain how companies are formed.</li> <li>• Describe the benefits of forming a business to manufacture and sell a product.</li> <li>• Describe Private vs. Public companies</li> <li>• Know Procedures for companies to go public</li> <li>• Understand public company stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• Stock Market Game</li> <li>• Websites: Investopedia, finance.yahoo</li> </ul>	<ul style="list-style-type: none"> <li>• Students select three famous people who have started companies using</li> <li>• <a href="https://www.thoughtco.com/inventions-4133303">https://www.thoughtco.com/inventions-4133303</a></li> <li>• Students analyze companies and industries from IPO to current time</li> <li>• Students list several stocks they are considering for their portfolios, explain the performance of each and why each is a good investment.</li> </ul>

## Business Department Curriculum – Investing and the Stock Market

	<ul style="list-style-type: none"><li>• Know the different stock exchanges</li><li>• Understand how companies on the stock exchange are identified</li><li>• Describe how stocks benefit the holders</li></ul>		
<b>Vocabulary</b>			
Company	Common Stock	Dividend	
Corporation	Private Company	P/E Ratio	
Entrepreneur	Dividend	Share	
Partnership	Earnings	Stock	
Private corporation	Investor	Volume	
Public corporation	IPO		
Sole-proprietorship	Preferred Stock		

<b>Unit 2: The Stock Market and Identification of Investments</b>	
<b>Big Idea: How to pick a profitable stock while keeping investments diversified.</b>	
<b>Standard:</b> <u><b>BCIT - Finance and Economics</b></u> <b>15.6.12.R.</b> <b>Compare and contrast various investment plans to achieve goals of liquidity, income, and growth.</b> <b>15.6.12.Q.</b> <b>Apply the “Rule of 72” to estimate the number of periods required to double an investment.</b>	<b>Essential Questions:</b> <ul style="list-style-type: none"> <li>• What is diversification?</li> <li>• How to research stocks?</li> <li>• What is risk?</li> <li>• What is a bond?</li> <li>• What is a dividend?</li> <li>• What is capital gains and how is it calculated?</li> </ul>

<b>15.6.12.R. Compare and contrast various investment plans to achieve goals of liquidity, income, and growth.</b> <b><u>Economics</u></b> <b>6.5 Work and Earnings</b> <b>G. Analyze the risks and returns of various investments</b>			
Eligible Content	Competencies	Resources	Assessments
<ul style="list-style-type: none"> <li>• Stock Market behind the scenes</li> <li>• Stock Market Exchange</li> <li>• Skills to make educated investment decisions</li> </ul>	<ul style="list-style-type: none"> <li>• Create a diversified portfolio selecting stocks from at least six industries</li> <li>• Conduct internet research on investment options, write a summary of their findings and present their findings to the class</li> <li>• Interpret company and industry charts to determine which investments their SMG team should make</li> <li>• Define diversification, risk tolerance, industry, index</li> </ul>	<ul style="list-style-type: none"> <li>• Stock Market Game</li> <li>• Websites: Investopedia, finance.yahoo</li> </ul>	<ul style="list-style-type: none"> <li>• PowerPoint on diversification</li> <li>• Stock Market Research Worksheet</li> <li>• Virtual \$100,000 stock pick, risk, tolerance for risk.</li> </ul>

• **Vocabulary**

Diversification	Beta Number	Earnings Per Share
Index	Price/Earnings Ratio (P/E Ratio)	Profit Margin
Industry	Conservative	Earnings Before Tax
Portfolio	Moderate	Debt Ratio
Risk	Speculative	Stock P/E Ratio
Risk Tolerance	Volatile/Volatility	
Sector	Earnings Growth	

•

**Unit 3: Corporate/Economic Data and Buy/Sell/Hold**

**Big Idea: Causes of Stock Market changes and when to buy/sell/hold to keep healthy and diverse portfolios.**

**Standard:**

**BCIT - Finance and Economics**

**15.6.12.R.**

**Compare and contrast various investment plans to achieve goals of liquidity, income, and growth.**

**15.6.12.A. Evaluate the impact of internal and external influences on financial decisions.**

**15.6.12.I. Analyze the functions of the Federal Reserve and other financial institutions.**

**15.6.12.P. Develop financial investment plans to accommodate various economic and personal scenarios.**

**15.6.12.R. Compare and contrast various investment plans to achieve goals of liquidity, income, and growth.**

**Economics**

**Essential Question:**

- What causes stock prices to change?
- What is buy, sell, and hold in stock trading?

<b>G. Analyze the risks and returns of various investments</b> <b>6.1.12</b> <b>B. Analyze the impact of traditional, command and market economies on the United States economy.</b> <b>6.2.12</b> <b>C. Analyze policies designed to raise or payment. use in society. the Federal Reserve System.</b>			
Eligible Content	Competencies	Resources	Assessments
<ul style="list-style-type: none"> <li>Economic data (i.e., Corporate Earnings, Corporate News, Unemployment data, CPI, Retail Sales</li> <li>Effects of buying, selling, or holding a position in stocks</li> </ul>	<ul style="list-style-type: none"> <li>Analyze and interpret market indices, which influence changes of the overall stock market.</li> <li>Discuss the various ways stock prices are influenced</li> <li>Evaluate the ways investors can be affected by the change in market prices when choosing to buy, sell or hold.</li> <li>To interpret charts and graphs to better understand the growth and change in stock prices.</li> <li>Draw conclusions on whether to buy, hold, or sell based on group and individual research.</li> <li>Compare and contrast companies based upon stock market statistical data</li> <li>Math: Analyze basic financial data.</li> </ul>	<ul style="list-style-type: none"> <li>Stock Market Game</li> <li>Websites: Investopedia, finance.yahoo</li> </ul>	<ul style="list-style-type: none"> <li>Ask students to visit the “Investor Relations” website for one of the companies in their portfolio and download an annual report. Students will use the report to create a slideshow reviewing the reasons the company’s shares were up or down over the past year. Students write a prediction as to the possible future of the company. Presentations can be made in class and discussed.</li> <li>Have SMG teams do a financial analysis of each of the companies currently in their portfolio or that they plan to purchase. In addition to sector information and the company’s annual report, what other indicators should they review when making informed decisions? Each team should develop a rubric showing what financial information is most important to them. How do each of their stocks compare to those in the same industry or in the same sector? Have students go to websites such as Yahoo! Finance or TheStreet.com to see other types of statistical analysis. In the rubric, have them include their action, either to buy, sell or hold.</li> </ul>

	<ul style="list-style-type: none"> <li>Technology: Students will use the Internet to obtain annual reports and research companies across the same industry.</li> </ul>		
<b>Vocabulary</b>  Earnings Market Capitalization P/E Ratio Cyclical Stocks Industry Net Income Profit Revenue Sector			

Unit 4: Portfolio Analysis and Investment Strategy	
<b>Big Idea:</b> Evaluation and explanation of investment strategies and the success of the diversity and profitability of investment portfolios.	
<b>Standard:</b> <u><b>BCIT - Finance and Economics</b></u> <b>15.6.12.R.</b> <b>Compare and contrast various investments plans to achieve goals of liquidity, income, and growth.</b> <b>15.6.12.A. Evaluate the impact of</b>	<b>Essential Question:</b> <ul style="list-style-type: none"> <li>How do you calculate the profitability of an investment portfolio?</li> <li>How does capital gains relate to the sale of stock?</li> <li>How did analyzing economic data help in picking stocks with high profits?</li> <li>What investment strategies have I learned to help in future purchases of stocks?</li> </ul>



<p><b>internal and external influences on financial decisions.</b>  <b>15.6.12.I. Analyze the functions of the Federal Reserve and other financial institutions.</b>  <u><b>Economics</b></u>  <b>6.5 Work and Earnings</b>  <b>G. Analyze the risks and returns of various investments</b></p>			
Eligible Content	Competencies	Resources	Assessments
<p>Profitability of stock portfolio  Capital gains at the sale of stocks  Strategies experienced traders use in buying, selling, and holding stock  Highs and lows of stocks purchased using graphs  Prepare presentations to evaluate stock portfolios</p>	<p>Draw supported conclusions as to whether their strategy in preparing their portfolio was successful and what investment changes they might have made to improve portfolio performance. •  Generate a detailed report including support material. •  Deliver a convincing presentation. •  Give and receive</p>	<ul style="list-style-type: none"> <li>• Stock Market Game</li> <li>• Websites: Investopedia, finance.yahoo</li> </ul>	<ul style="list-style-type: none"> <li>• Name two investments that you heard about from other teams that you would now consider for your team's portfolio.</li> <li>• Name one company that you heard about today that had its stock prices impacted by current events. What was the event and how did it impact the company?</li> <li>• In your opinion, which team had the best investment strategy? Explain</li> </ul>

	constructive criticism. • Evaluate the work of other team members and other students.		
<b>Vocabulary</b>  <b>Dividends</b> <b>Capital Gains</b> <b>Stock Split</b>			