Excel Stock Market

Understandings in this lesson

Finance:
- Sectors, diversification, various finance calculations

Excel:
- Formatting: merge cells, line breaks (alt-enter), borders, add/delete rows and columns and updating formulas and ranges accordingly, conditional formatting, currency, decimal places
- Live feed from Google Finance (i.e. the "current price" column)
- Various finance calculations and also using various Excel functions (SUM, ROUND)
- Charting (be certain to create and update the table as you add/delete sectors!)

Use the sample file that I attached (Credit goes to and modified from http://www.mydividendgrowth.com/)

Ideas to guide students:
- Set-up column headers (sector, symbol, number of shares, original price, cost basis, basis
- per share, current price, Value, % Change from original price, $ Change from original price)
- Choose an amount of sectors
- Choose a variety of companies per sector
- Input ticker symbols
- Input number of shares

Ideas:
- Run your own stock market game.
- Or have your class do it in conjunction with the Economics/Personal Finance teacher ... nice collaboration effort!
- Add in ratios (for example, find some here: https://www.investopedia.com/financial-edge/0910/6-basic-financial-ratios-and-what-they-tell-you.aspx) or other metrics and calculations as you wish (for example, including commission costs, dividend re-investment)

For the current price column, to pull live feed you have two choices:
1) plug-in "stock connector" from Microsoft (will need MS account to be able to install it, or I guess your school's IT admin)

-or-

2)
Use external data:
a) Data > Get & Transform > New Query > From Other Sources> From Web
b) Enter the URL from https://api.iextrading.com/

Ex. https://api.iextrading.com/1.0/stock/aapl/quote
c) Press the "Into Table" Button then "Close & Load"
d) You should be able to refresh the table as needed.

Sources used for this document: Programming4Finance (Youtube), DashboardBuilding.com,
Mydividendgrowth.com