

Lesson Plan

Text: *Financial Algebra* by Robert Gerver and Richard Sgroi

Unit number and title: Unit 1-6 Stock Transactions

Developed by: David Sandefur

Date:

Short Description:

Students will likely know the word “portfolio”, but will associate it with an artist or a student portfolio for college. Students should make connections between what they know about portfolios and stock portfolios.

LESSON PLAN

TEACHER: Teacher Prep/ Lesson Plan

- **Essential Question**

What is a stock portfolio?

- **Lesson Objectives**

The student can:

1. Learn the basic vocabulary of buying and selling stock.
2. Compute gains and losses from stock trades.

- **Statement of pre-requisite skills needed**

Skills taught in:

1. Unit 1-2, Stock Market Data
2. Unit 1-2, Stock Market Data Charts
3. Unit 1-4, Simple Moving Averages
4. Unit 1-5, Stock Market Ticker

- **New Vocabulary:**

Portfolio	A grouping of all the stocks that an investor owns
Round Lot	A multiple of 100 100 shares; stocks are usually bought and sold in round lots
Odd Lot	A group of stocks that is less than 100 shares
Trade	When a stock is bought or sold
Gross Capital Gain	The difference between the selling price and the purchase price of a stock when the shares are sold at a greater price than they were purchased
Gross Capital Loss	The difference between the selling price and the purchase price of a stock when the shares are sold at a lower price than they were purchased

- **State Standards addressed:**

Common Core Standards:

Number and Quantity – Quantities N-Q
Algebra – Creating Equations A-CED

- **Set-up information (Remind students to follow these basic rules.)**
- Be Prepared to work
- No Teasing
- Proper Computer Usage

- **Teacher Assessment of student learning (scoring guide, rubric)**

Informal Assessments:

1. Walk around
2. Thumbs up or down
3. Homework

Formal Assessments:

1. End of Unit test

- **Summary of learning**

1. Introduce the vocabulary to the students.
 - a. Give the vocabulary list without definitions
 - b. Give the definitions to the vocabulary list
 - c. Discussion about each term of the vocabulary
2. Ask:
 - a. What is a stock portfolio?
 - b. Is a stock portfolio stagnant (does not change)?
3. Work on Examples to Strengthen skills
 - a. Example 1, page 36
 - b. Example 2, page 36
 - c. Example 3, page 37
 - d. Example 4, page 37
4. Check for Understanding
 - a. Check Your Understanding 1, page 36
 - b. Check Your Understanding 2, page 36
 - c. Check Your Understanding 3, page 37
 - d. Check Your Understanding 4, page 37
5. Assess with Applications

REACHING ALL LEARNERS – Differentiated Instruction for students with

Developing Knowledge	On-level Knowledge	Advanced Knowledge
<input type="checkbox"/> Needs help working Example 1, page 36 (Group work)	<input type="checkbox"/> Able to work Example 1, page 36 without assistance	<input type="checkbox"/> Able to create additional problems like Example 1, page 36
<input type="checkbox"/> Needs help working Example 2, page 36 (Group work)	<input type="checkbox"/> Able to work Example 2, page 36 without assistance	<input type="checkbox"/> Able to create additional problems like Example 2, page 36
<input type="checkbox"/> Needs help working Example 3, page 37 (Group work)	<input type="checkbox"/> Able to work Example 3, page 37 without assistance	<input type="checkbox"/> Able to create additional problems like Example 3, page 37

<input type="checkbox"/> Needs help working Example 4, page 37 (Group work)	<input type="checkbox"/> Able to work Example 4, page 37 without assistance	<input type="checkbox"/> Able to create additional problems like Example 4, page 37
<input type="checkbox"/>	<input type="checkbox"/> Able to work the Check Your Understanding problems, pages 36-37	<input type="checkbox"/> Able to work and explain the Check Your Understanding problems, pages 36-37

- **Optional activities**

Hands-on Labs

- **Career Applications**

Banker

Stock Broker

Accountant

Economist

Venture Capitalist

Investors

- **Evaluation of Lesson Plan**

What went well?

What did not go as well as planned?

What would I keep and what would I toss? Why?

How well did the students master the skills? Will we need to review this in order for them to remember the information long-term?

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