

WAMC Lab Template

Math Concept(s): Stock Market, Introduction, Dividend Income

Source / Text: Learning, Earning, and Investing For a New Generation Council for Economic Educations

Developed by: Jamie Zeller E-Mail: zellerj@wvwsd208.org Date: Summer Conference 2017

Attach the following documents:

- Lab Instructions
See What is a Stock (PDF)
See What is a Stock (PPT)
- Student Handout(s)
See What is a Stock (PDF)
- Rubric and/or Assessment Tool
See Quiz_whatistastock (created and downloaded from www.socrative.com - free for basic online testing)

Short Description (Be sure to include where in your instruction this lab takes place):

Pre-Stock Market Chapter - This is a great lab to 'test the waters' and see what your students already know about the stock market.

Lab instructions (PDF) is pretty explanatory. A googleslide (converted to powerpoint) is included (created using the PDF).

Lab Plan

Lab Title: What is a Stock?

Prerequisite skills: Little to no knowledge of stock market. Lab uses students various levels of knowledge about the stock market to not only give a very basic introduction/basic vocabulary about the stock market but uses the various levels of previous knowledge to also teach the idea behind dividends.

Lab objective: Student will-

Define income, saving, stock, and dividend.

Explain why people buy stock.

Identify advantages and disadvantages of owning stocks.

Explain ways in which stockholders can reduce risk.

Standards: (Note SPECIFIC relationship to Science, Technology, and/or Engineering)

Mathematics K–12 Learning Standards:

- A-CED1

Standards for Mathematical Practice:

- Make sense of problems and persevere in solving them.
- Use appropriate tools strategically.
- Attend to precision.

K-12 Learning Standards-ELA (Reading, Writing, Speaking & Listening): (Potential)

- R1.9-10.8

- W.9-10.1a
- W.9-10.1b
- W.9-10.6
- SL.9-10.2

K-12 Science Standards: (Potential)

- HS-ETS1-4

Technology: (Potential)

- 1.1.2
- 1.2.1
- 1.3.3
- 2.1.1
- 2.2.2
- 2.3.1

Engineering

- HS-ETS1-4

OTHER CONTENT STANDARDS

Washington State Financial Standards:

- Financial Decision Making
- Investing

Voluntary National Content Standards in Economics, 2nd Edition

- **Standard 2:** Effective decision making requires comparing the additional costs of alternatives with the additional benefits. Many choices involve doing a little more or a little less of something: few choices are “all or nothing” decisions.

National Standards in K-12 Personal Finance Education, 3rd Edition

- **Saving and Investing Standard 1:** Discuss how saving contributes to financial well-being.
- **Saving and Investing Standard 3:** Evaluate investment alternatives.
- **Saving and Investing Standard 4:** Describe how to buy and sell investments

Leadership/21st Century Skills:

<p><u>21st Century Interdisciplinary themes</u> (Check those that apply to the above activity.)</p> <input checked="" type="checkbox"/> Global Awareness <input checked="" type="checkbox"/> Financial/Economic/Business/Entrepreneurial Literacy <input type="checkbox"/> Civic Literacy <input type="checkbox"/> Health/Safety Literacy <input type="checkbox"/> Environmental Literacy			
<p><u>21st Century Skills</u> (Check those that students will demonstrate in the above activity.)</p>			
<p>LEARNING AND INNOVATION</p> <p><u>Creativity and Innovation</u></p> <input type="checkbox"/> Think Creatively <input checked="" type="checkbox"/> Work Creatively with Others <input type="checkbox"/> Implement Innovations <p><u>Critical Thinking and Problem Solving</u></p> <input checked="" type="checkbox"/> Reason Effectively <input type="checkbox"/> Use Systems Thinking <input checked="" type="checkbox"/> Make Judgments and Decisions <input checked="" type="checkbox"/> Solve Problems <p><u>Communication and Collaboration</u></p> <input checked="" type="checkbox"/> Communicate Clearly <input checked="" type="checkbox"/> Collaborate with Others	<p>INFORMATION, MEDIA & TECHNOLOGY SKILLS</p> <p><u>Information Literacy</u></p> <input type="checkbox"/> Access and Evaluate Information <input type="checkbox"/> Use and manage Information <p><u>Media Literacy</u></p> <input type="checkbox"/> Analyze Media <input type="checkbox"/> Create Media Products <p><u>Information, Communications and Technology (ICT Literacy)</u></p> <input type="checkbox"/> Apply Technology Effectively	<p>LIFE & CAREER SKILLS</p> <p><u>Flexibility and Adaptability</u></p> <input type="checkbox"/> Adapt to Change <input type="checkbox"/> Be Flexible <p><u>Initiative and Self-Direction</u></p> <input checked="" type="checkbox"/> Manage Goals and Time <input type="checkbox"/> Work Independently <input type="checkbox"/> Be Self-Directed Learners <p><u>Social and Cross-Cultural</u></p> <input checked="" type="checkbox"/> Interact Effectively with Others <input checked="" type="checkbox"/> Work Effectively in Diverse Teams	<p>Productivity and Accountability</p> <input type="checkbox"/> Manage Projects <input type="checkbox"/> Produce Results <p><u>Leadership and Responsibility</u></p> <input checked="" type="checkbox"/> Guide and Lead Others <input checked="" type="checkbox"/> Be Responsible to Others

<https://wa-appliedmath.org/>

Teacher Preparation: (What materials and set-up are required for this lab?)

Materials

- Slides 3.1 and 3.2
- 1 copy of Activity 3.1 per group
- 3 copies of Activity 3.2
- 1 copy of Activity 3.3 per student
- An envelope, one sheet of plain white paper, one marker, and one sheet of construction paper for each group of 3-4 students
- A roll of transparent tape for each group of 3-4 students
- A large supply of small, wrapped candies – a minimum of 30 pieces per group of 3-4 students

Set-Up Required: (More detailed instructions, see What is a Stock PDF and What is a Stock PPT)

- Write your name on line labeled Teacher's Name on Activity 3.1. Make a copy of Activity 3.1 for each group. Cut each copy on the perforated lines and place strips in an envelope. Label the envelope Shares of Stock Group 1, etc. There should be an envelope for each group in the classroom.
- Have all copies ready (as per above).

Lab Organization Strategies:

Leadership (Connect to 21st Century Skills selected):

- Global Awareness – Students recognize the global impact.
- Financial/Economic/Business/Entrepreneurial Literacy – Students make the connection with the stock market.
- Work Creatively with others – Students work as a family to make decisions and answer questions.
- Reason Effectively/Make Judgments and Decisions/Solve Problems – Students have to problem solve and come up with a reason answer to a question they may not know together.
- Communicate Clearly/Collaborate with Others - Students have to problem solve and come up with a reason answer to a question they may not know together.
- Manage Goals and Time – Groups have to quickly discuss questions before time is up.
- Interact Effectively with Others/Work Effectively in Diverse Teams/Guide and Lead Others/Be Responsible to Others – Students are working together in random groups and must be a team player.

Cooperative Learning:

- See above

Expectations:

- Students are expected to use their prior knowledge of the stock market to win "dividends" in a "family" competition. Students, of all levels, will be able to get a basic understanding of how the stock market works and what dividends are.

Timeline:

- 1 classroom period (~50 minutes)

Post Lab Follow-Up/Conclusions:

Discuss real world application of learning from lab

- Career Applications

- Stock Broker
- Financial Advisor

Optional or Extension Activities

Gen i Connection

Mission 8 of the Gen i Revolution game provides an introduction to buying and selling stocks. In this mission, students are introduced to Uncle Louie. Louie is recently retired. He is financially well off after his career in the construction industry. He wants to start investing in stocks to benefit his nephew, but he doesn't know much about buying and selling stock. In this mission's 4-1-1 tutorial, students learn about the basics of stock, why people buy stock, and what the advantages and disadvantages of owning stock are. In the mission's conclusion, Students answer questions about selecting stocks for Uncle Louie.

Gen i Reflection

How would you respond if Uncle Louie asked you, "If you were in my shoes, would you be comfortable taking the risk of investing in stocks? I know my money will be safest in the bank."

Since this is an introductory lesson, many extensions can follow.

<https://wa-appliedmath.org/>