GOOGLE FINANCE PORTFOLIO INSTRUCTIONS

(1)   www.google.com/finance

(2)   **Click Sign in.**

One account. All of Google.

Sign in to continue to Google Finance
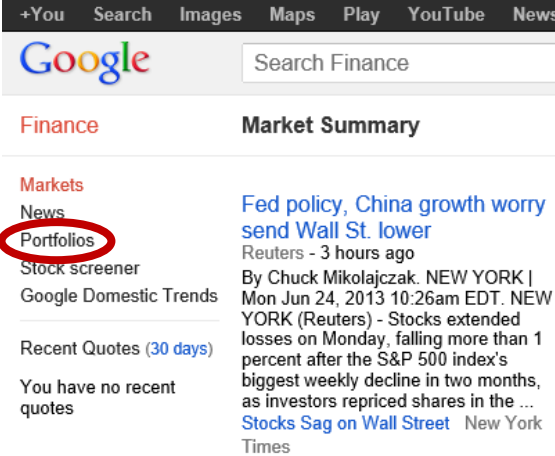
Email

Password

Sign in

☐ Stay signed in   Need help?

Create an account

At www.investedok.org on every **STARS** page is a *STARS Resource* box.
A video created by subject-matter expert Matt Ingram walks you through setting up the portfolio, step by step.

Click *Sign in* if you have a Google account.
Click *Create an account* if you do not have account.
Make note of your new email and password.

Strong Recommendation: **Un**check the *Stay signed in* box.

(3)   **PORTFOLIO**

Click *Portfolios* in the left column.

+You   Search   Images   Maps   Play   YouTube   News
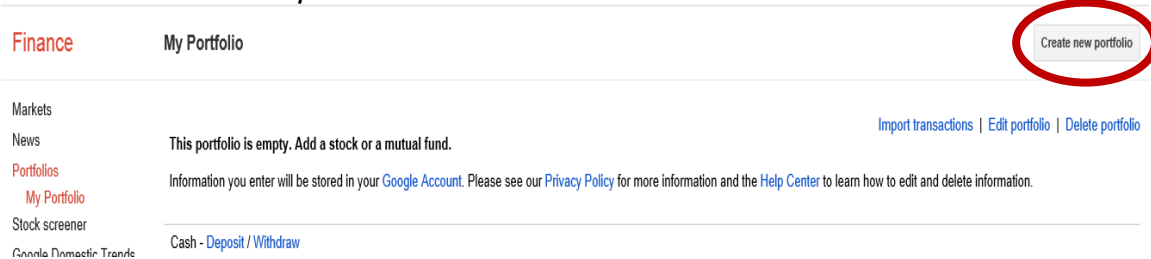
Google   Search Finance

Finance   **Market Summary**

Markets
News   Fed policy, China growth worry
Portfolios   send Wall St. lower
Stock screener Reuters - 3 hours ago
Google Domestic Trends   By Chuck Mikolajczak. NEW YORK |
                Mon Jun 24, 2013 10:26am EDT. NEW
Recent Quotes (30 days)   YORK (Reuters) - Stocks extended
                losses on Monday, falling more than 1
You have no recent   percent after the S&P 500 index's
quotes   biggest weekly decline in two months,
                as investors repriced shares in the ...
                Stocks Sag on Wall Street   New York
                Times

Click *Create new portfolio.*

Finance   **My Portfolio**   Create new portfolio

Markets
News   Import transactions | Edit portfolio | Delete portfolio
Portfolios   This portfolio is empty. Add a stock or a mutual fund.
  My Portfolio
Stock screener Information you enter will be stored in your Google Account. Please see our Privacy Policy for more information and the Help Center to learn how to edit and delete information.
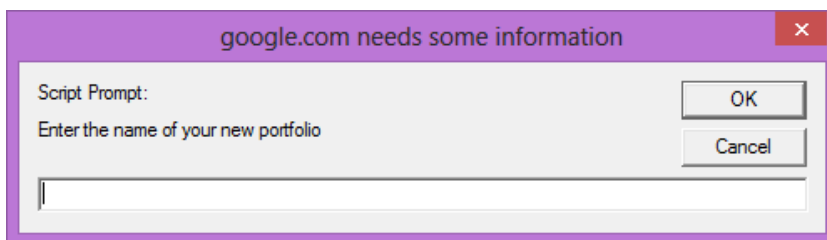Google Domestic Trends
                Cash - Deposit / Withdraw

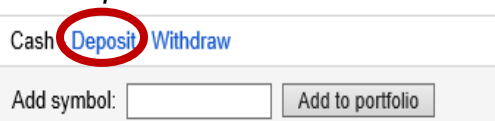**(4)   NAME PORTFOLIO**

Enter portfolio name in box that displays at the top left, and click OK.
Spaces and symbols are allowed.

(5)   DEPOSIT CASH

Click *Deposit*.
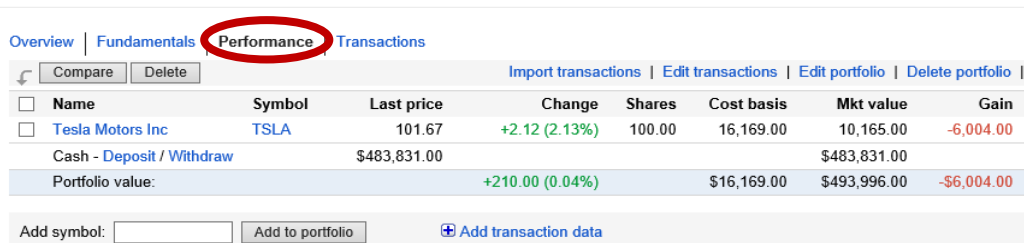

Enter the current date. Enter the amount $500,000, an over-exaggerated
amount to enable students to experience impact. **Click *Add to portfolio*.**
Notes section is optional. Our project deposits cash one time only.
Never will our project *withdraw* cash.

(6)   VIEW

Create portfolio in *Performance* view. Click *Performance*.

Transactions View
Teachers, *transactions* view allows you to monitor student portfolio activity.
It displays every transaction detail—type, date, shares, price, etc. This is a way
for you to monitor student activity if you wish. Consider having students print this
page from time to time to monitor student activity. Our project does not require
this step. (Optional)

(7)   PURCHASE STOCKS

(a) Enter symbol or start typing company name. Possible company names and their exchanges pop up. Be certain to click company name from the list (rather than typing the symbol). CAUTION: Verify the exchange is in the USA. (NYSE or NASDAQ) Then, click *Add to portfolio*.

Add symbol:	[ ]	Add to portfolio	⊞ Add transaction data

Google automatically populates the data; but no shares of stock have been purchased yet, and cash has not been affected.

Overview | Fundamentals | Performance | Transactions

Compare   Delete   Import transactions | Edit transactions | Edit portfolio | Delete portfolio | Download to spreadsheet | Download to OFX

☐	Name	Symbol	Last price	Change	Mkt cap	Volume	Open	High	Low	Day's gain
☐	Tesla Motors Inc	TSLA	102.35	+2.80 (2.81%)	11.83B	5.72M	96.5	102.87	95.3	
	Cash - Deposit / Withdraw		$500,000.00							

Add symbol:	[ ]	Add to portfolio	⊞ Add transaction data

(b) Click +*Add transaction data* to add number of shares and reduce cash for each purchase.
1. Add symbol; enter symbol or start typing company name. **Important**: Click company name from pop up. (will not work if you type in name)
2. Verify *Type* is Buy.
3. Enter *Date*.
4. Enter *Shares*.
5. Enter current *Price*—copy from portfolio.
6. *Commission*: Our project does not use this feature. If you choose to use it, the recommendation is 1%.
7. *Notes*: optional
8. Verify *Deduct from cash* is checked.
9. Click *Add to portfolio*.

Cash adjusts to reflect the purchase.

Overview | Fundamentals | Performance | Transactions

Compare   Delete   Import transactions | Edit transactions | Edit portfolio | Delete portfolio | Download to spreadsheet | Download to OFX

☐	Name	Symbol	Last price	Change	Shares	Cost basis	Mkt value	Gain	Gain %	Day's gain	Overall return
☐	Tesla Motors Inc	TSLA	101.67	+2.12 (2.13%)	100.00	16,169.00	10,165.00	-6,004.00	-37.13%	+210.00	-37.13%
	Cash - Deposit / Withdraw		$483,831.00				$483,831.00				
	Portfolio value:			+210.00 (0.04%)		$16,169.00	$493,996.00	-$6,004.00	-37.13%	+$210.00	-37.13%

Add symbol:	[ ]	Add to portfolio	⊞ Add transaction data

Repeat steps (a) and (b) for each stock purchase. There are two methods to purchase stocks. Enter all the stocks first, step (a), and then go back and enter the data, step (b). Or, follow the steps in (a) - (b) order. Also, you can delete a stock entered in step (a) if you choose not to purchase it.

(8) DELETE STOCK FROM PORTFOLIO

During the initial portfolio setup, it is okay to delete a stock. A box displays to the left of each stock name. To delete a stock from the portfolio, click the box and then click *Delete* above the *Name* column. During the tracking time, it is <u>not</u> okay to delete a stock; rather, students may <u>sell</u> stock following the initial setup.

(9) EDIT PORTFOLIO

Click *Edit Transactions* (from either *Performance* or *Transactions* view).

The edit screen displays in *Transactions* view.

Students may edit portfolios during the initial portfolio set up or when purchasing new stocks. For example, the number of shares can be adjusted. Or, if the wrong cash amount was entered, this is where to make that correction. During tracking, students may buy additional shares or sell existing shares. This is not editing.

Make edits, and click *Save changes*. Google returns portfolio to *Performance* view.

(10)   SELL STOCK

Click the +*Add transaction data* (*Performance* view).

1. Add symbol; enter symbol or start typing company name. **Important**:
   Click company name from pop up. (will not work if you type in name)
2. Verify *Type* is **Sell**.

Our project does not use *Buy to Cover* or *Sell Short* features.

3. Enter *Date*.
4. Enter *Shares* to sell.
5. Enter current *Price*—copy from portfolio.
6. *Commission*: Our project does not use this feature. If you choose to use
   it, the recommendation is 1%.
7. *Notes*: optional
8. Verify *Deduct from cash* box is checked.
9. Click *Add to portfolio*.

Cash adjusts to reflect sale.

(11)   DETAILS

Click either the company name or symbol to view a page with details about the
company.

(12)   PORTFOLIO RELATED NEWS

Articles related to companies in the portfolio are displayed under the portfolio.

(13) PRINT

Print in *Performance* view.

> It may be necessary to "right" click anywhere on the portfolio page, and then click <u>print</u> from the pop-up menu.
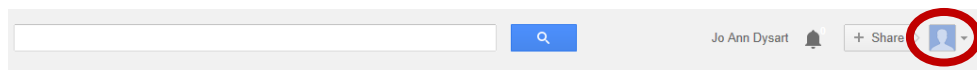
Print in *Landscape* orientation.

> Go into the printer's preferences to switch from portrait to landscape. Explore the tabs for this setting.

> Only submit the actual portfolio page/s. Do not submit the portfolio related news articles.

> REMINDER: No matter how many pages your portfolio prints, it is only counted as ONE page for the report.

(14) SIGN OUT

Click the *profile* icon at the top right.

Click *Sign out*.

(15) FREE APP - OPTIONAL

The free Google Finance Portfolio app is available for both Android and Apple devices. In the App store, search for Google Finance. It may be named stock tracker. It may appear as one of these images.