



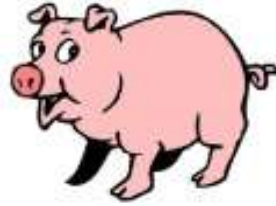
Live “Stock” Adventure

**Skills in saving,
investing and math
for middle school
students**

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Live “Stock” Adventure

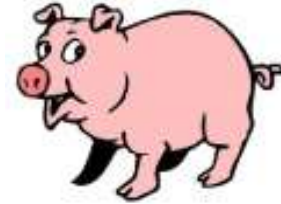


- Fun and educational activity
- Designed for 6th-8th grade students
- The goals:
 - Raise awareness of the value of saving and investing
 - Practice math skills such as calculating percentages and computing multi-digit numbers
- Free to download
- Uses a standard deck of 52 playing cards





Live "Stock" Adventure



www.nasaa.org/investor_education/13167.cfm

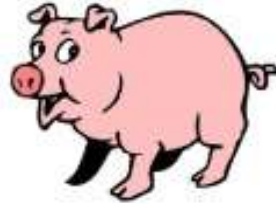
- Provided Online:
 - Directions
 - Exchange Tracking Sheet
 - Student Ledger
 - Situation Guide
 - Four Price Change Mini-Posters
- Evaluation Form

The screenshot shows the NASAA Investor Education page. The header includes the NASAA logo and navigation tabs for 'ABOUT NASAA', 'INVESTOR EDUCATION', 'ISSUES & ANSWERS', 'NASAA NEWSROOM', and 'INDUSTRY & REGULATORY RESOURCES'. A sidebar on the left lists 'IN THIS SECTION' with links to various resources like 'Investor Awareness Quiz', 'NASAA Fraud Center', and 'Senior Investor Resource Center'. Below this is a search bar and 'QUICKLINKS' for 'Contact Your Regulator', 'What's New', 'Member Login', and 'E-mail Updates'. The main content area is titled 'Investor Education' and 'Welcome to the Live "Stock" Adventure'. It features three cartoon animal icons: a cow, a pig, and a duck. The text explains that the Live 'Stock' Adventure is a fun and educational activity for middle school students in grades six to eight, aimed at raising awareness of saving and investing while practicing math skills. It is free to download and played with a standard deck of 52 playing cards. A 'Get started on the Adventure today!' section lists items to play: Directions, Exchange Tracking Sheet, Student Ledger Sheet, Deck of Playing Cards, Situation Guide, Four Animal 'Stock' Price Change Mini-Posters, and Calculators, scratch paper and pencils. A note mentions that a specialized deck of colorful Live 'Stock' situation cards may be available from state or provincial securities regulators. At the bottom, it asks for user feedback and provides a link to a teacher evaluation form.





Beginning the Adventure



- Post the 4 Mini Posters in Class
- Distribute Student Ledger Sheets to Class
- Teacher Keeps Exchange Tracking Sheet*



LIVE "STOCK" ADVENTURE
Guide to INCREASE-DECREASE in Stock Prices & Situations

Acc. 1. The farmer is worried in a fair land deal (regular financial basis).

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

2. 2. A local dam overflows and floods the farm.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

3. 3. An unexpected drought occurs.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

4. 4. Lightning strikes the farm's weather vane and burns the barn.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

5. 5. A hollows when out the farmer's crop.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

6. 6. A mysterious land developer wants to buy the land.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

7. 7. 7. Horses cause the farm animals to get sick.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

8. 8. Three days of food shortage cause a long drought.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

9. 9. The price of medicine decreases.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

10. 10. The price of medicine increases.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

11. 11. The price of medicine decreases.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

12. 12. An insect infestation ruins the farm's crop.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12

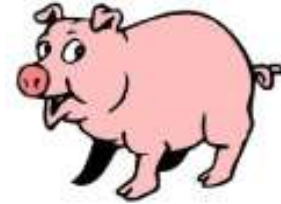
13. 13. The land is rented and creates a shortage of veterinary services.

Cow	Horse	Chicken	Sheep	Donkey	Dog	Rooster	Pig	Fox
10	12	18	15	10	12	12	12	12





Student Ledger Sheet



ROUND _____

Student _____

Class _____

Date _____

Initial Cash Received _____

LIVE "STOCK" ADVENTURE
Student Ledger Sheet

= Cash on Hand _____

Stock	Starting Price	multiply	Number Shares Purchased	equals	Starting Value of Stock Holdings	Situation 1 Adjustment	Situation 2 Adjustment	Situation 3 Adjustment	Situation 4 Adjustment	Situation 5 Adjustment	Sum of Adjustments (situations 1-6)	New Stock Price	multiply	Number Shares Purchased	equals	Ending Value of Stock Holdings
Cow		X		=									X		=	
Horse		X		=									X		=	
Chicken		X		=									X		=	
Sheep		X		=									X		=	
Donkey		X		=									X		=	
Dog		X		=									X		=	
Duck		X		=									X		=	
Rooster		X		=									X		=	
Pig		X		=									X		=	
Fox		X		=									X		=	

(1) purchased stock holdings _____
 (2) + Cash on Hand _____
 (3) TOTAL Portfolio Value _____

(4) New Total Portfolio Value _____
 (5) + Cash on Hand _____
 (6) PORTFOLIO NET WORTH _____

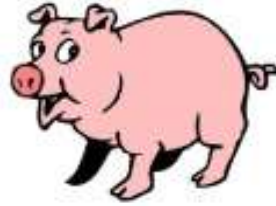
cash on hand % of Total Value _____
 cow % of Total Value _____
 horse % of Total Value _____
 chicken % of Total Value _____
 sheep % of Total Value _____
 donkey % of Total Value _____
 dog % of Total Value _____
 duck % of Total Value _____
 rooster % of Total Value _____
 pig % of Total Value _____
 fox % of Total Value _____
TOTAL PERCENTAGE
 must = 100% _____

- Records initial stock purchase and market impacts for each round





Exchange Tracking Sheet



Exchange Representative _____
 Class _____
 Date _____

LIVE "STOCK" ADVENTURE
Exchange Tracking Sheet

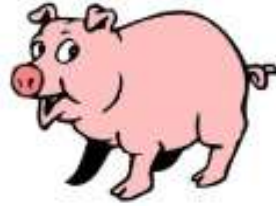
Stock	Starting Price	ROUND 1					New	ROUND 2					New	ROUND 3					New	ROUND 4					New	ROUND 5					Ending Price							
		Situation 1 Adjustment	Situation 2 Adjustment	Situation 3 Adjustment	Situation 4 Adjustment	Situation 5 Adjustment		Situation 1 Adjustment	Situation 2 Adjustment	Situation 3 Adjustment	Situation 4 Adjustment	Situation 5 Adjustment		Situation 1 Adjustment	Situation 2 Adjustment	Situation 3 Adjustment	Situation 4 Adjustment	Situation 5 Adjustment		Situation 1 Adjustment	Situation 2 Adjustment	Situation 3 Adjustment	Situation 4 Adjustment	Situation 5 Adjustment		Situation 1 Adjustment	Situation 2 Adjustment	Situation 3 Adjustment	Situation 4 Adjustment	Situation 5 Adjustment								
cow	25.00																																					
horse	25.00																																					
chicken	25.00																																					
sheep	50.00																																					
donkey	50.00																																					
dog	50.00																																					
duck	75.00																																					
rooster	75.00																																					
pig	75.00																																					
fox	100.00																																					

- This sheet is the master ledger or key
- Records price changes for all stocks





Beginning the Adventure

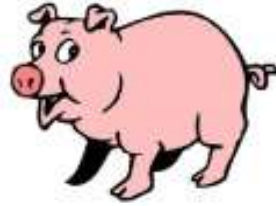


- Each student starts with a “virtual” \$300
- Chooses which stocks to buy
 - Review purchase price (directions and exchange tracking sheets)
 - Review increase/decrease amounts (directions and mini posters)
 - Discuss risk versus reward and diversification
- Can reserve some cash
- Optional: Record an investment goal





The “Situation”

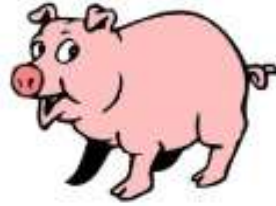


- A “situation” represents a day in the market
 - One round = one “week”
- Draw one card per situation and read it to the class
- Students record the value changes to the stocks on their Student Ledger Sheet
 - Students only need to record changes for stocks they own
 - Record the change amount (single cost, no matter how many shares you own)





End of the Round

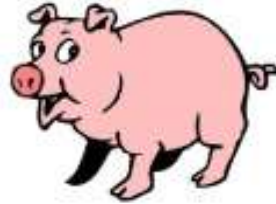


- Total the adjustments (column L)
- Verify the new stock price (column M) with what the exchange representative has recorded ($M \text{ should} = B - L$)
- Compute the ending value (column Q)
- Complete 4-6 to find out portfolio net worth
- Optional: Compute percentages





Completing the Game



- Rounds 2-5 continue in the same manner
- Use the New Stock Price from the previous round as the Starting Price at the beginning of each round
- Optional discussion or writing assignment at conclusion – topics may include:
 - Investment goals, diversification, budgeting, profit versus loss, risk tolerance, etc.
 - Adventure's impact on students





Other Resources

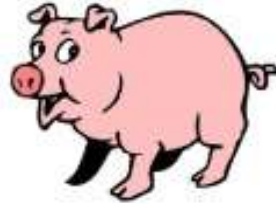


- Other Investor Education Resources:
 - The Basics of Saving and Investing 2020
www.investorprotection.org/teach/?fa=basics
 - MoneyTrack Videos
<http://moneytrack.org/videos-2/top-stories/>
 - FSI: Fraud Scene Investigator Online Game
www.nasaa.org/Investor_Education/FSI/
 - Stock Market Game/Take Stock in KY
www.econ.org/teachers/index.html





Questions?



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www.kfi.ky.gov/public/teacher.htm

