

# Financial Markets Project



BUSI710/ Fall2020  
Professor Kobus/ Mia Zhong & Tingting Shi

# Investment Strategies

## Popular Stocks

————— We started off by looking at the stocks of some well-known large companies. We focused on companies in the e-commerce space like Amazon and Alibaba. Next were social networking companies like Facebook, Twitter, and so on.

## Rising Stocks

————— Next, we turned our attention to some stocks that have been rallying nicely, mainly in the technology and innovation sectors. They are not very stable, but they have the potential to surprise in a big and unpredictable way.

## Stable Stocks

————— The previous attempts did not bring us the desired benefits. We started to focus on more stable stocks, such as gold and financial services stocks.

# Business Database — week 1 (11/1-11/6)



Alibaba Group  
阿里巴巴集团

**BABA** 255.83 -0.97 

**Share Price: \$287.09**

**Number of Shares: 30**

**Market Value: \$7,661.30**

**Reason for trade:**

## BABA Ranked 3rd in

# IndustryINTERNET COMMERCIAL



Alibaba Tumbles as China Suspends Ant Group's IPO, the price of Alibaba stock fell more from recent highs on Nov,3.

BABA  
Alibaba Gr...




30

287.09

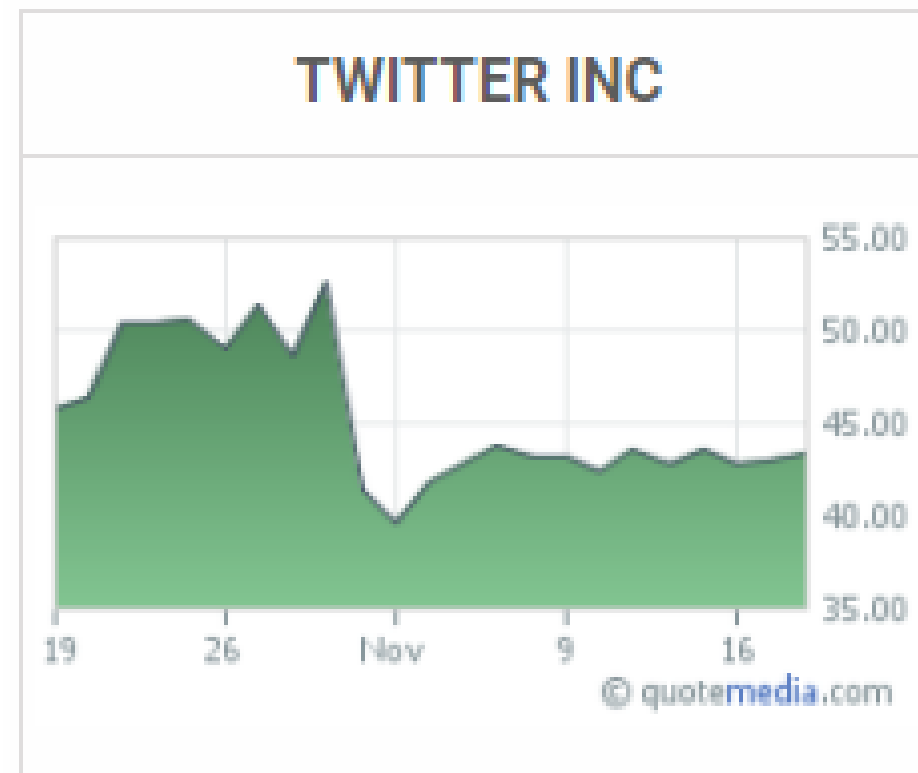
255.83

-0.97 

\$7,674.90

-937.80   
(-10.89%)

# Business Database — week 1 (11/1-11/6)



**TWTR** 43.33 0.48

**Share Price:** \$42.13

**Number of Shares:** 5

**Market Value:** \$219.25

**Reason for trade:**

Oct. 30, Twitter stock plunged 21% after the company's Q3 results.



**amazon.com.**

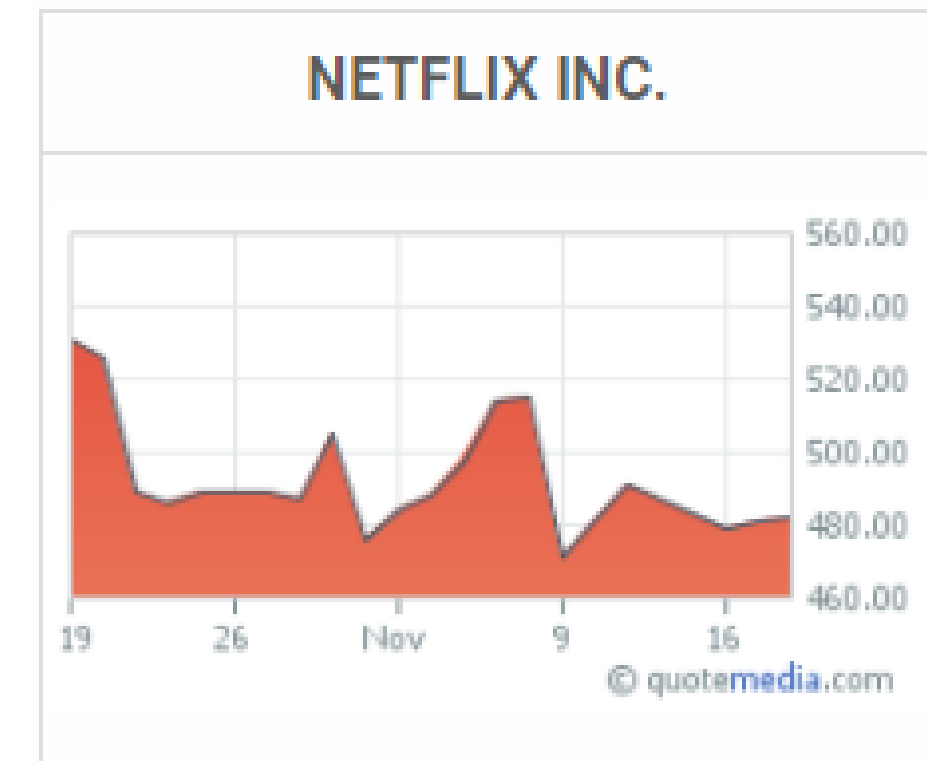
**AMZN** 3,105.46 -30.20

**Share Price:** \$3050.20

**Number of Shares:** 10

**Market Value:** \$31,212.15

**Reason for trade:** It's the lowest price than recent one month.



**NETFLIX**

**NFLX** 481.79 1.16

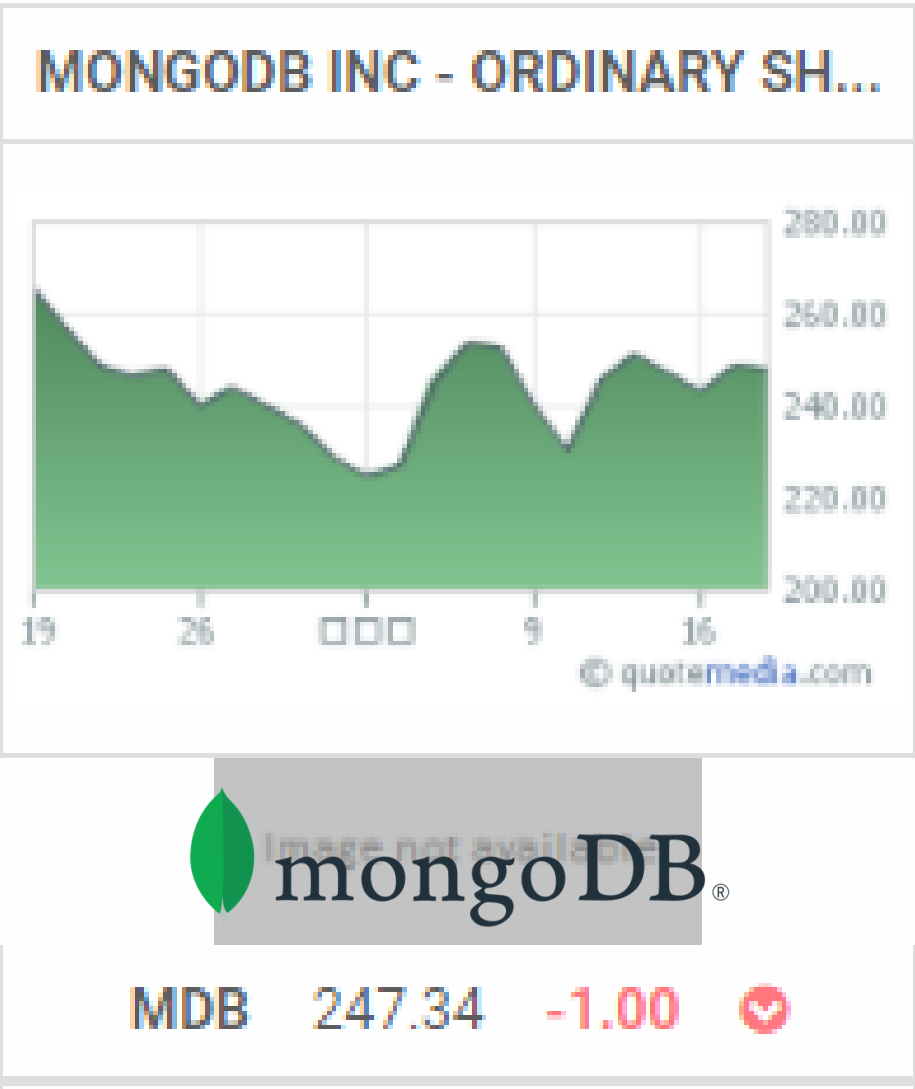
**Share Price:** \$488.45

**Number of Shares:** 10

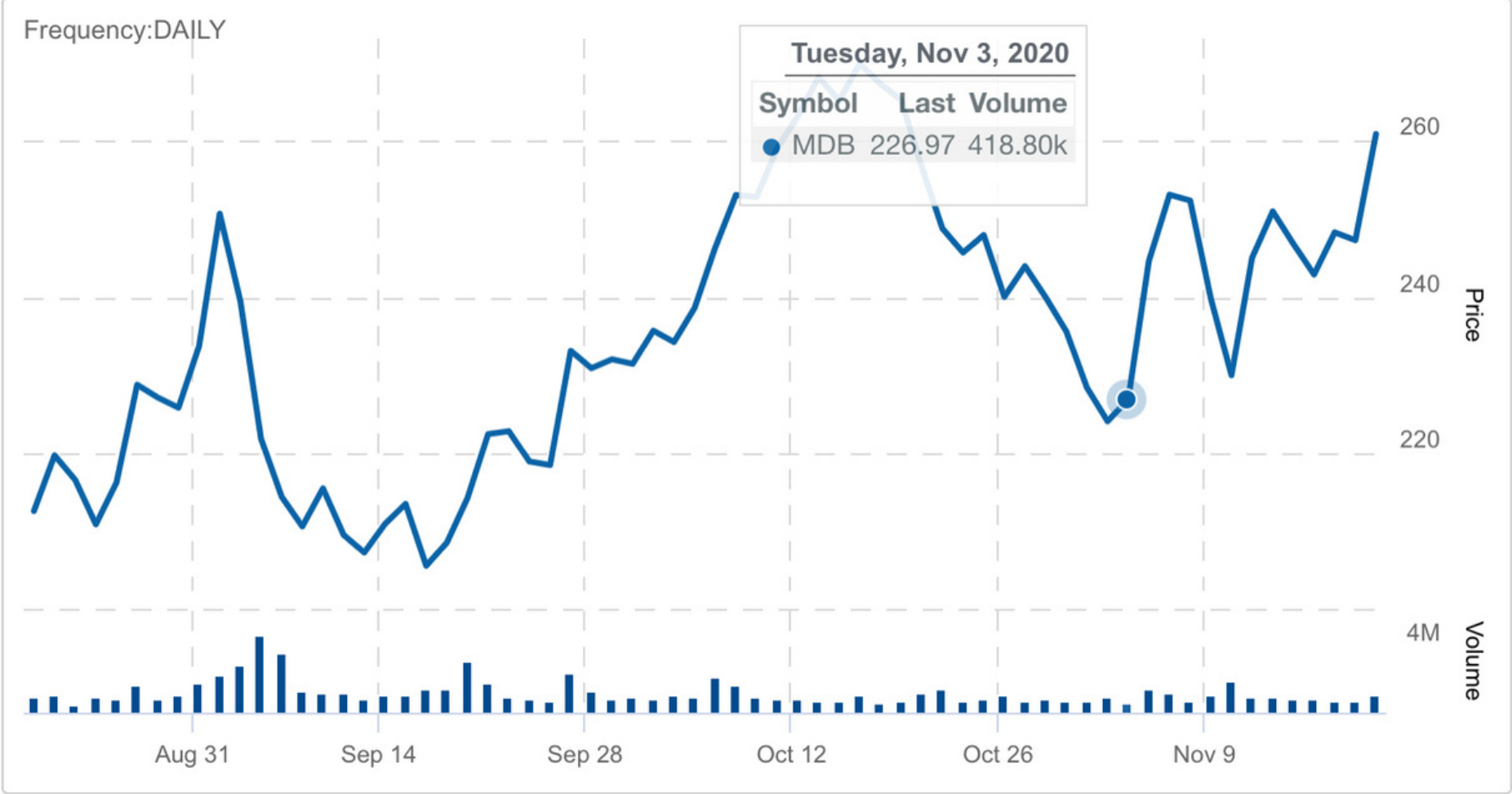
**Market Value:** \$4,863.85

**Reason for trade:** NFLX Ranked 12th in Industry BRDCST-RADIO/TV

# Business Database — week 1(11/1-11/6)



Stock Symbol: MDB  
Share Price: \$226.63  
Number of Shares:10  
Market Value: \$2473.4

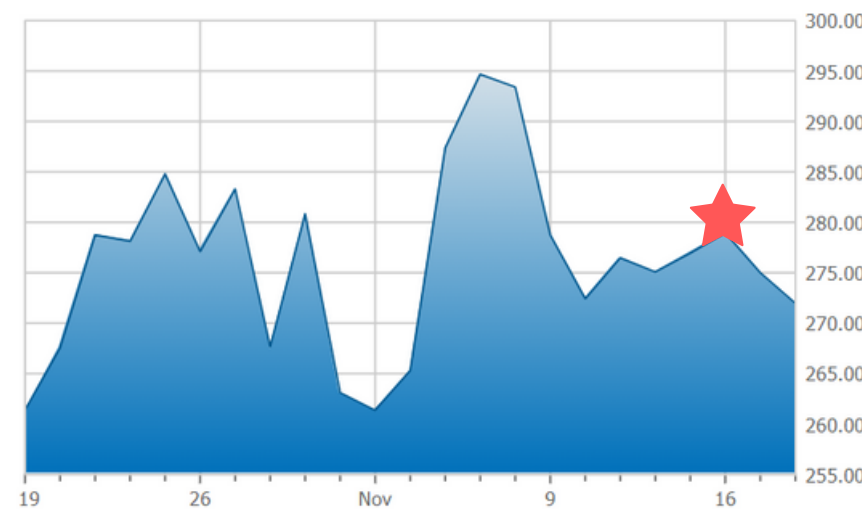


- 10.21 Statement of **changes in beneficial ownership** of securities
- 11.9 Statement of **changes in beneficial ownership** of securities
- 11.18 MongoDB, Inc. Announces Date of **Third Quarter Fiscal 2021** Earnings Call. It will be hold on Dec.8.

MongoDB is a document-oriented database management system written in C++ and other languages to solve a number of real-world problems in the application development community.

# Business Database — week 1(11/1-11/6)

## Facebook, Inc.



facebook

Stock Symbol: FB

Share Price: \$266.23

Number of Shares: 15

Market Value: \$3993.45

Reason for trade:

social media giant

**sold: \$278.79 in Nov 16(Week 3)**

## INTERNATIONAL BUSINESS MA...



IBM

IBM 116.77 -0.93

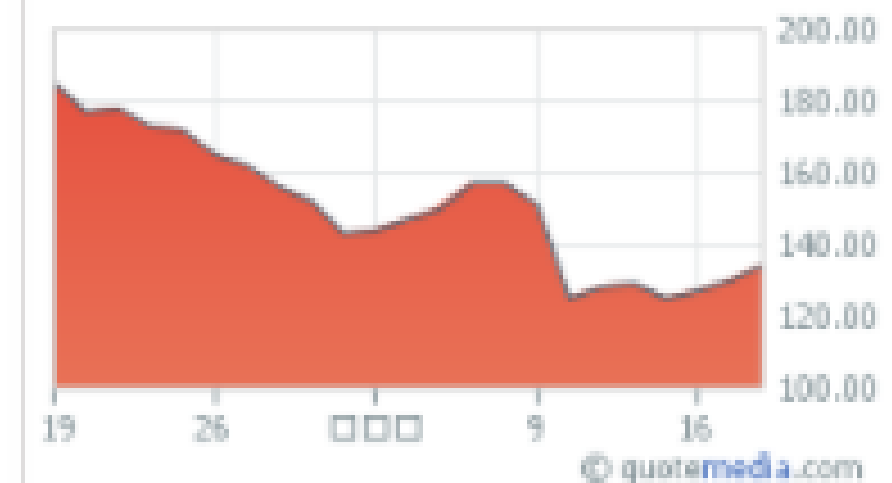
Share Price: \$112.42

Number of Shares: 25

Market Value: \$2946.75

Reason for trade: IBM Ranked  
8th in Industry  
COMPUTER-  
INTEGR

## BEYOND MEAT INC



BYND 134.01 4.11

Stock Symbol: BYND

Share Price: \$147.46

Number of Shares: 15

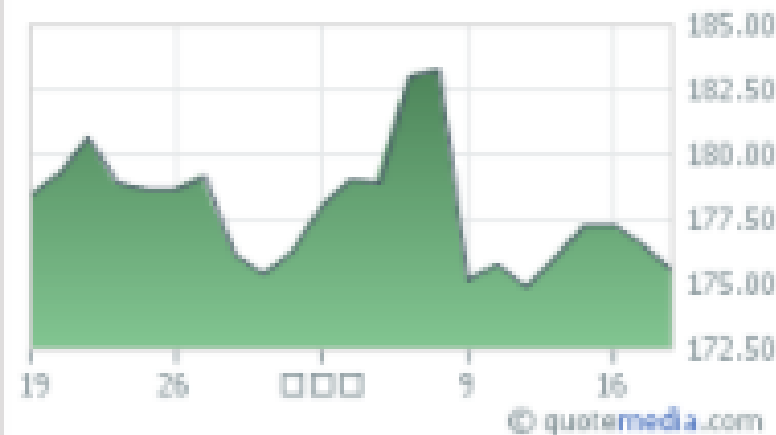
Market Value: \$2010.15

Reason: Emerging industries with  
promising development prospects.

current value: 104,526.48

# Bussiness Database — Week 2 (11/9-11/13)

SPDR GOLD TRUST ETF



GLD 175.49 -1.01

Stock Symbol: GLD

Share Price: \$174.83

Number of Shares: 12

Market Value: \$2105.88

Reason: Bargain purchase.

Stabilize stocks.

PFIZER INC.



PFE 36.32 0.28

Share Price: \$38.80

Number of Shares: 20

Market Value: \$731.90

Reason for trade: PFE Ranked  
11thin IndustryLARGE CAP PHARM

NOVARTIS AG



NVS 85.72 -0.80

Share Price: \$84.66

Number of Shares: 30

Market Value: \$2,582.10

WAL-MART STORES INC.



WMT 149.09 -0.28

Share Price: \$145.43

Number of Shares: 20

Market Value: \$2908.6

Reason for trade: WMT Ranked  
4thin IndustryRETAIL-  
SUPERMKT

sold: \$152.37 in Nov, 16 (week 3)

current value: 100,668.24



# Business Database — Week 2 (11/9-11/13)



**Stock Symbol:** BA  
**Share Price:** \$179.94  
**Number of Shares:** 6  
**Market Value:** \$1220.06

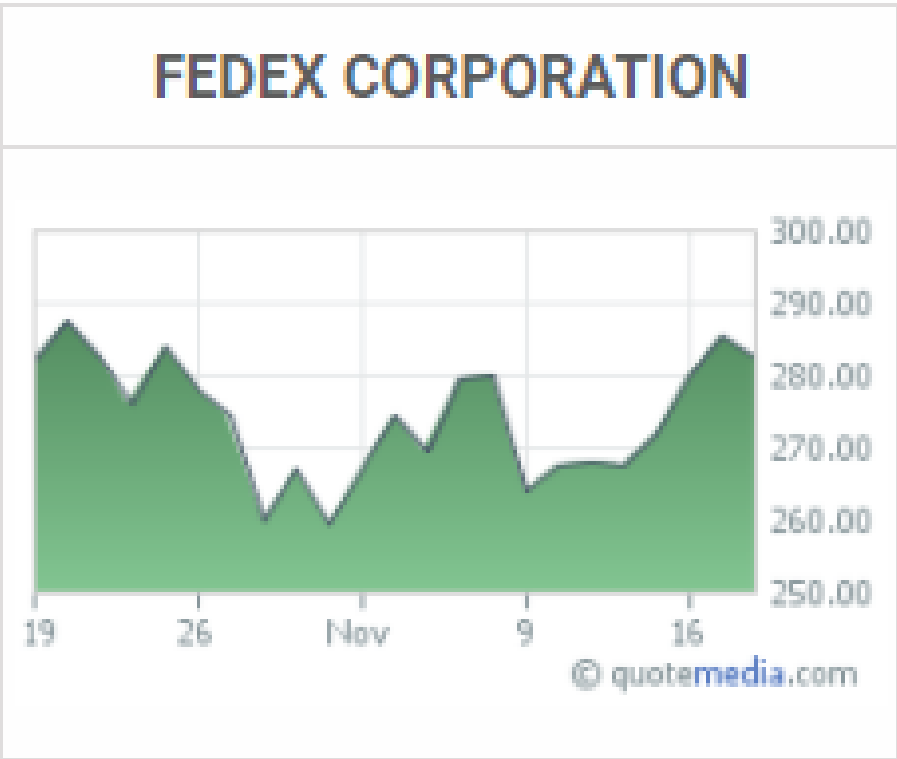


Boeing is the world's largest aerospace and defense firm. With headquarters in Chicago, the firm operates in four segments, commercial airplanes, defense, space & security, global services, and Boeing capital.

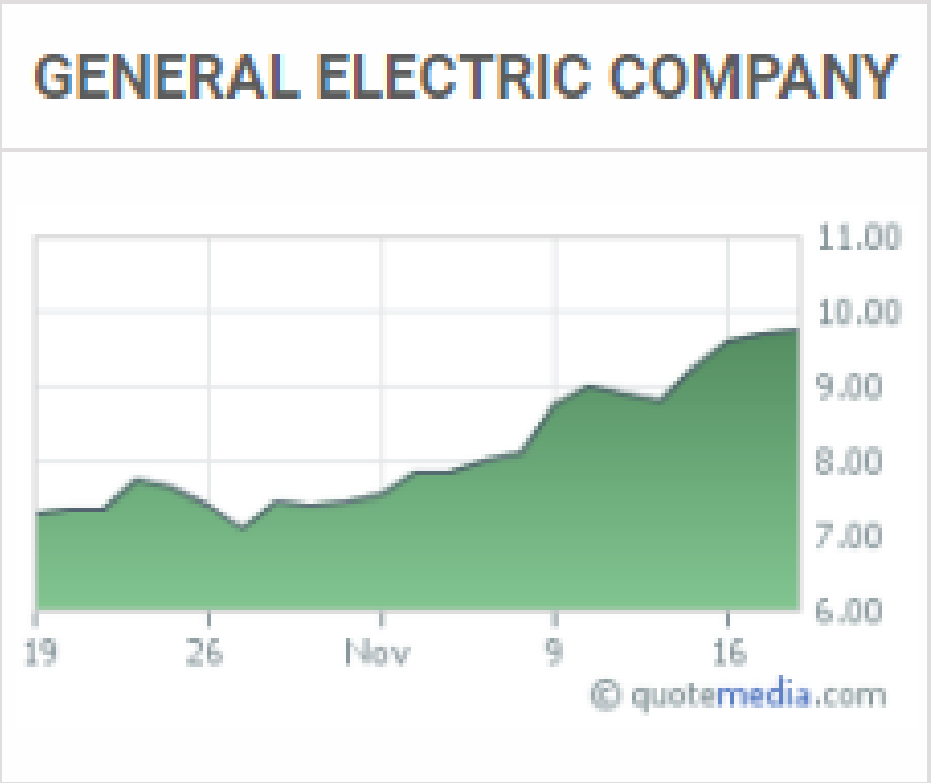
- 11.9 Pfizer (NYSE:PEE) announces near-success in **vaccine development**. Brings hope for aviation recovery.
- 11.12 Boeing announced that it received **no new orders** for commercial aircraft in October, and also had 12 existing orders for 737 Max cancelled.
- 11.17 The FAA is expected to **lift the "Flight Ban"** on the 737 MAX on the 18th.
- 11.18 Transport **Canada: acknowledges** the airworthiness directive issued by the U.S. Federal Aviation Administration.



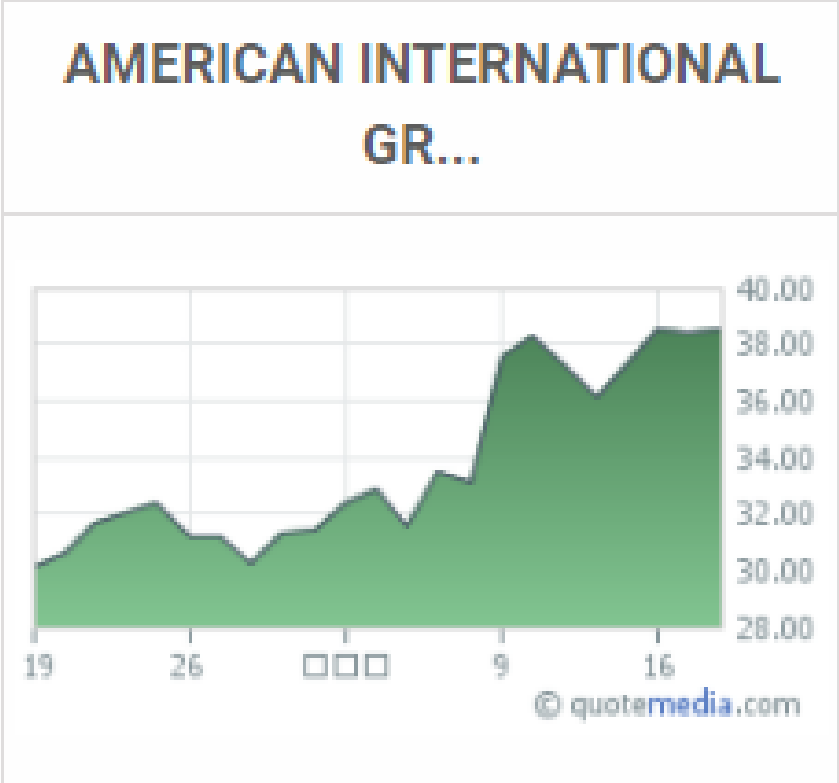
# Business Database — week 3 (11/16-11/18)



**FDX** 282.50 -2.55 ▼  
Share Price: \$279.45  
Number of Shares: 10  
Market Value: \$2834.52



**GE** 9.73 0.05 ▲  
Share Price: \$9.55  
Number of Shares: 30  
Market Value: \$292.95



**AIG** 38.55 0.13 ▲  
Share Price: \$38.27  
Number of Shares: 25  
Market Value: \$963.75



**JPM** 115.25 -0.86 ▼  
Share Price: \$116.24  
Number of Shares: 10  
Market Value: \$1,155.90

current value:100,628.65

# Conclusion

- current value:\$104,526.48 (week 1)  
current value:\$100,668.24 (week 2)  
current value:\$100,628.65 (week 3)
- **Diversification works could reduce risk and target higher returns.**
- **The stable stocks aren't necessarily “safe” over short periods.**



# Thank you

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