WEEK 7

Assignment 1 Part 1 Submission

Assignment 1: Financial Research Report

Part 1 Due Week 7 and worth 100 points

Imagine that you are a financial manager researching investments for your client. Think of a friend or a family member as a client. Define her or his characteristics and goals such as an employee or employer, relatively young (less than 40 years) or close to retirement, having some savings/property, a risk taker or risk averter, etc. Next, use Nexis Uni at the Strayer University library, located at Nexis Uni, click on "Company Dossier" to research the stock of any U.S. publicly traded company that you may consider as an investment opportunity for your client. Your investment should align with your client's investment goals. (**Note**: Please ensure that you are able to find enough information about this company in order to complete this assignment. You will create an appendix, in which you will insert related information.)

Your final financial research report will be 6 to 8 pages long and be completed in two parts as noted below. This assignment requires you to use at least five quality academic resources and cover the following topics:

- Rationale for choosing the company in which to invest
- Ratio analysis
- Stock price analysis
- Recommendations

Refer to the following resources to assist with completing your assignment:

Stock Selection

- *Forbes*: "Six rules to follow when picking stocks"
- CNN Money: "Stocks: Investing in stocks"
- The Motley Fool: "13 steps to investing foolishly"
- Seeking Alpha: "The Graham And Dodd Method For Valuing Stocks"
- Investopedia: "Guide to Stock-Picking Strategies"
- Seeking Alpha: "Get Your Smart Beta Here! Dividend Growth Stocks As 'Strategic Beta' Investments"

Market and Company Information

- U.S. Securities and Exchange Commission: "Market structure"
- Yahoo! Finance
- Mergent Online (**Note:** This resource is also available through the Strayer Learning Resource Center.)
- Seeking Alpha (**Note:** This is also available through the Android or iTunes App store.)
- Morningstar (**Note:** You can create a no-cost Basic Access account.)
- Research Hub, located in the left menu of your course in Blackboard

Part 1 Due Week 7 (1 to 2 pages)

1. Provide a rationale for the stock that you selected, indicating the significant economic, financial, and other factors that led you to consider this stock.
2. Suggest the primary reasons why the selected stock is a suitable investment for your client. Include a description of your client's profile.
3. Just list **five** resources you'll use to complete this assignment and begin to build your reference list. Remember you must use at least five quality academic resources for the final assignment.