**FIN310 Fall 2016**

**Term Project**

One purpose of this project is to get familiar with the financial market and institutions. The second purpose is to get familiar with the databases subscribed by JU. The databases are hosted by JU library.

Visit library.ju.edu. Then scroll over “Subject Guide”. Click on “Management, Marketing and International business”. You will see a list of databases subscribed. The three databases for this project are Mergent, Valueline, and Lexis Nexis.

Carefully follow the steps below.

1. Choose a firm to study, such as AAPL.
2. Go to Valueline database. Locate the report of the firm in Valueline. Save it.
3. Go to Mergent database.
   1. Collect the information of the executives. Any comments?
   2. Collect the ownership information. Comments?
   3. Locate the top 10 institutional investors of this firm.
      1. What types of institutions are they? You can google each institution to answer this question.
      2. Write down the brief history of each institution.
   4. Choose the data items that you want to remind of other students. Generate a report using report builder in Mergent. Save your report.
4. Go to Lexis Nexis database. Search for recent news regarding the ownership changes among institutions in the prior month or longer. Your comments?
5. Close up your report by summarizing the additional information provided by the three databases, beyond what is available in Google finance.

This project will be due on the final exam date.