

PROGRAM DESCRIPTION I

Program Title STOCKS FILE AND EVALUATION

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Program Description, Equations, Variables

Program maintains a file of stocks. This file is read to cards for storage. At any time the file can be expanded, updated, listed, or sorted. The stocks are sorted to find any stock showing a loss or a stock which has reached the target selling price.

Necessary Accessories PRINTER, CARD READER, AT LEAST 2 MEMORY MODULES

Operating Limits and Warnings 2 Memory modules will handle up to 6 stocks. Each added stock requires 4 more registers.

Reference(s)

This program has been verified only with respect to the numerical example given in *Program Description II*. User accepts and uses this program material AT HIS OWN RISK, in reliance solely upon his own inspection of the program material and without reliance upon any representation or description concerning the program material.

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PROGRAM DESCRIPTION II

Sample Problem (Sketch if Desired)

Three stocks have been purchased. We wish to establish our stock file. The stock data is listed below:

STOCK NAME	NUMBER OF SHARES	TARGET SELLING PRICE	DOW JONES AVERAGE AT PURCHASE	PURCHASE PRICE
VWXYZ	196	18½	835.26	11 1/8
RST	94	85	845.58	62
FGHI	1250	25	856.44	11 ½

SOLUTION: Set SIZE 027

Input	Function	Display	Comments
	XEQ "BONUS"	UPDATE ?	BONUS
-	R/S	NEW STOCK ?	
0	"	SELL CHECK ?	
-	"	STOCK LIST ?	NEW STOCK
0	"	CARD	
-	"	14.250	VWXYZ
VWXYZ	"	NAME	STKNO = 1.
196	"	SHARE =	SHARE = 196.000
18.5	"	\$SELL =	\$SELL = 18.500
835.26	"	DJBUI =	DJBUI = 835.260
11.125	"	\$ BUY =	\$ BUY = 11.125
0	"	MORE STOCKS ?	
RST	"	NAME	RST
94	"	SHARE =	STKNO = 2.
85	"	\$SELL =	SHARE = 94.000
845.58	"	DJBUI =	\$SELL = 85.000
62	"	\$ BUY =	DJBUI = 845.580
0	"	MORE STOCKS ?	\$ BUY = 62.000
FGHI	"	NAME	FGHI
1250	"	SHARE =	STKNO = 3.
25	"	\$SELL =	SHARE = 1,250.000
856.44	"	DJBUI =	\$SELL = 25.000
11.5	"	\$ BUY =	DJBUI = 856.440
-	"	MORE STOCKS ?	\$ BUY = 11.500
		RDY 1 OF 1	
			STOCK LIST
			STOCK NO. STOCK NAME
			1. "VWXYZ"
			2. "RST"
			3. "FGHI"

PROGRAM DESCRIPTION II

Sample Problem (Sketch if Desired)

Continuing our problem of the previous page we wish to add a fourth stock to our file and update the data on the first 3 stocks. We also want to sort the first 3 stocks for losers and stocks at the target selling price.

STOCK NAME	NUMBER OF SHARES	TARGET SELLING PRICE	DOW JONES AVERAGE	PURCHASE PRICE	PRICE NOW
ABCDE	125	9½	905.15	5 3/8	-
VWXYZ	-	-	"	-	15
FGHI	-	-	"	-	27.5
RST	-	-	"	-	55

SOLUTION: Set Size 031

Input	Function	Display	Comments
	XEQ "BONUS"	UPDATE ?	
0	R/S	NEW STOCK ?	BONUS
0	"	SELL CHECK ?	
0	"	STOCK LIST ?	
0	"	CARD	NEW STOCK
DATA CARD	"	NAME	
ABCDE	"	SHARE =	ABCDE
125	"	\$SELL =	STKNO = 4.
9.5	"	DJBUR =	SHARE = 125.000
905.15	"	\$ BUY =	\$SELL = 9.500
5.375	"	MORE STOCKS ?	DJBUR = 905.150
-	"	STOCK NO. ?	\$ BUY = 5.375
1	"	DJNOW =	
905.15	"	\$ NOW =	
15	"	MORE STOCKS ?	UPDATE STOCK
0	"	STOCK NO. ?	
3	"	DJNOW =	VWXYZ
905.15	"	\$ NOW =	STKNO = 1.
27.5	"	MORE STOCKS ?	DJNOW = 905.150
0	"	STOCK NO. ?	\$ NOW = 15.000
2	"	DJNOW =	
905.15	"	\$ NOW =	
55	"	MORE STOCKS ?	FGHI
-	"	RDY 1 OF 2	STKNO = 3.
			DJNOW = 905.150
			\$ NOW = 27.500
			RST
			STKNO = 2.
			DJNOW = 905.150
			\$ NOW = 55.000

(CONTINUATION PAGE)

STOCK LIST

STOCK NO.	STOCK NAME
1.	"VMXYZ"
2.	"RST"
3.	"FGHI"
4.	"ABCDE"

SELL CHECK

RST

SHARE = 94.000
 \$ BUY = 62.000
 \$SELL = 85.000
 \$ NOW = 55.000
 DJBUY = 845.580
 DJNOW = 905.200
 \$ NOW = 5,170.000
 \$ BUY = 5,828.000
 \$GAIN = -658.000

Stock RST is showing a loss, it may need to be sold

FGHI

SHARE = 1,250.000
 \$ BUY = 11.500
 \$SELL = 25.000
 \$ NOW = 27.500
 DJBUY = 856.440
 DJNOW = 905.200
 \$ NOW = 34,375.000
 \$ BUY = 14,375.000
 \$GAIN = 20,000.000

Stock FGHI has reached its target sale price, it may be time to take the profit

END SELL CHECK

020130

USER INSTRUCTIONS

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SIZE FOR 1 STOCK-- increases by 4 registers for each added stock

SIZE: 019 (min)
(HP-41C)

STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1			XEQ"BONUS"	UPDATE ?
2	to update stock prices	0	R/S	NEW STOCK ?
	No updating of stock prices	-	"	" "
3	To add new stocks to portfolio	0	"	SELL CHECK ?
	No new stocks	-	"	" "
4	To check for stocks at selling price	0	"	STOCK LIST ?
	No sell check	-	"	" "
5	For an up-to-date stock list	0	"	CARD
	No stock list	-	"	"
6	Input data cards			
	<u>SEQUENCE OF ROUTINES CALLED</u>			
	(1) NEW STOCK			
	(2) UPDATE			
	(3) STOCK LIST			
	(4) SELL CHECK			
	<u>NEW STOCK ROUTINE</u>			NAME
1	Input stock name(max 6 characters)	AAA	R/S	SHARE =
2	" number of shares purchased	X	"	\$SELL =
3	" target selling price	X	"	DJBUR =
4	" Dow Jones average at purchase	X	"	\$ BUY =
5	" purchase price	X	"	MORE STOCKS ?
6	For more new stocks to add	0	"	NAME
	No more new stocks	-	"	(go to next routine in sequence)

USER INSTRUCTIONS

 SIZE:
(HP-41C)

STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	<u>UPDATE ROUTINE</u>			STOCK NO. ?
1	Input stock number from list to update	X	R/S	DJNOW =
2	" Dow Jones average now	X	"	\$ NOW =
3	" current stock price	X	"	MORE STOCKS ?
4	For more stock prices to update	0	"	STOCK NO. ?
	No more stocks to update	-	"	RDY 1 OF X
5	Write data file to cards			
	NO INPUT IS REQUIRED FOR STOCK LIST OR SELL CHECK			

PROGRAM LISTING

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STEP/ LINE	KEY ENTRY	KEY CODE (67/97 only)	COMMENTS	STEP/ LINE	KEY ENTRY	KEY CODE (67/97 only)	COMMENTS
	01+LBL	"BONUS"			54 RCL	14	
	02 CF	00	CLEAR		55 "STKNO"		STOCK NO.
	03 CF	01	FLAGS		56 XEQ	98	
	04 CF	02			57 FIX	3	
	05 CF	03			58 ROFF		
	06 0				59 "SHARE"		NUMBER OF SHARES
	07 STO	14			60 XEQ	97	
	08 FIX	3			61 "\$SELL"		TARGET SALE PRICE
	09 "BONUS"		HEADING		62 XEQ	97	
	10 XEQ	99			63 "DJBUR"		DOW JONES AT
	11 1		SET FLAGS		64 XEQ	97	PURCHASE
	12 "UPDATE ?"				65 "\$ BUY"		PURCHASE PRICE
	13 PROMPT		UPDATE		66 XEQ	97	
	14 X=0?				67 RCL	03	
	15 SF	00			68 XEQ	23	
	16 1				69 RCL	02	
	17 "NEW STOCK ?"				70 XEQ	19	
	18 PROMPT		NEW STOCK		71 +		
	19 X=0?				72 STO	02	
	20 SF	01			73 RCL	04	
	21 1				74 XEQ	19	
	22 "SELL CHECK ?"				75 STO	04	
	23 PROMPT				76 RCL	05	
	24 X=0?		SELL CHECK		77 XEQ	19	
	25 SF	02			78 STO	05	
	26 1				79 RCL	14	
	27 "STOCK LIST ?"				80 XEQ	17	SET 1 ST DATA REGISTER
	28 PROMPT				81 XEQ	18	OF THIS STOCK
	29 X=0?		STOCK LIST		82 XEQ	22	STORE DATA
	30 SF	03			83 GTO	16	
	31 14.250		READ DATA FROM				
	32 RDTAX		CARDS				
	33 FS?C	01			84+LBL	17	ROUTINE TO SET
	34 GTO	30	NEW STOCKS		85 4		1 ST DATA REGR
					86 *		FOR A STOCK
	35+LBL	24			87 11.25		
	36 FS?	00			88 +		
	37 GTO	20	UPDATE		89 STO	00	
	38 FS?C	03			90 RTH		
	39 XEQ	25	STOCK LIST				
	40 GTO	31	SELL CHECK		91+LBL	18	ROUTINE TO
					92 RCL	01	STORE DATA
	41+LBL	16			93 STO	IND 00	NAME
	42 1.25		INPUT NEW		94 ISG	00	
	43 STO	00	STOCK DATA		95 RCL	02	
	44 1		POINTER		96 STO	IND 00	NO. SHARE. SALE PRICE
	45 ST+	14	STOCK NUMBER		97 ISG	00	
	46 AON				98 RCL	04	
	47 SF	12			99 STO	IND 00	DJBUR. DJNOW
	48 "NAME"				100 ISG	00	
	49 PROMPT		NAME		101 RCL	05	
	50 PRA				102 STO	IND 00	
	51 ASTO	01			103 ADV		
	52 CF	12			104 RTH		
	53 FIX	0					

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STEP/ LINE	KEY ENTRY	KEY CODE (67/97 only)	COMMENTS	STEP/ LINE	KEY ENTRY	KEY CODE (67/97 only)	COMMENTS
	105+LBL 20				160+LBL 21		
106	*UPDATE STOCK*		UPDATE ROUTINE		161 FS? 00		RETURN FOR FLAG CHECK
	107 FS? 00				162 GTO 24		
	108 XEQ 99				163 SF 14		
	109 CF 00				164 1		SET "X" REGR
	110 FIX 0				165 ST+ 14		FOR STORAGE
111	*STOCK NO. ?*		STOCK NUMBER PROMPT		166 RCL 14		OF DATA ON
	112 PROMPT				167 XEQ 17		CARDS
	113 STO 13				168 1		
	114 CLA				169 ST- 14		
	115 XEQ 17		SET 1 st DATA REGR		170 RCL 00		
	116 SF 12				171 1		
117	ARCL IND 00		NAME		172 -		
	118 PRA				173 XEQ 23		
	119 CF 12				174 14		
	120 7.25				175 +		DATA TO CARDS
	121 STO 00				176 WDTAX		
	122 RCL 13				177 CF 14		
	123 *STKNO*		STOCK No		178 FS? 03		
	124 XEQ 98				179 XEQ 25		LIST STOCK
	125 *DJNOW*		DOW JONES NOW		180 FS? 02		
	126 FIX 3				181 GTO 31		
	127 XEQ 97				182 STOP		
	128 *\$ NOW*		STOCK PRICE NOW				
	129 XEQ 97				183+LBL 22		MORE STOCK
	130 RCL 13				184 1		ROUTINE
	131 XEQ 17		RECALL EXISTING		185 *MORE STOCKS?*		
132	RCL IND 00		DATA INTO		186 PROMPT		
	133 STO 01		WORKING		187 X=0?		
	134 ISG 00		REGISTERS		188 RTN		
135	RCL IND 00				189 GTO 21		
	136 STO 02						
	137 ISG 00				190+LBL 19		
138	RCL IND 00				191 1 E3		DATA X1000
	139 STO 04				192 *		
	140 ISG 00				193 RTN		
141	RCL IND 00						
	142 STO 05				194+LBL 23		
	143 RCL 08				195 1 E-3		DATA 1000
	144 XEQ 23		ENCODE NEW DATA		196 *		
	145 RCL 04				197 RTN		
	146 INT						
	147 +				198+LBL 25		
	148 STO 04				199 *STOCK LIST*		STOCK LIST ROUTINE
	149 RCL 09				200 XEQ 99		
	150 XEQ 23				201 *STOCK NO. *		HEADING
	151 RCL 05				202 *\$ STOCK NAME*		
	152 INT				203 PRA		
	153 +				204 1		POINTERS
	154 STO 05				205 STO 01		
	155 RCL 13				206 15		
	156 XEQ 17		SET 1 st REGR		207 STO 02		
	157 XEQ 18		STORE DATA				
	158 XEQ 22						
	159 GTO 20						

PROGRAM LISTING

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STEP/ LINE	KEY ENTRY	KEY CODE (67/97 only)	COMMENTS	STEP/ LINE	KEY ENTRY	KEY CODE (67/97 only)	COMMENTS
	208*LBL 26				258 XEQ 19		
	209 FIX 0				259 RCL 01		IF LOST IN
	210 RCL 01		STOCK NUMBER		260 X>Y?		VALUE
	211 ACX				261 GTO 33		PRINTOUT
	212 9				262 2		DATA FOR SALE
	213 SKPCHR				263 ST+ 00		
	214 RCL IND 02		NAME		264 GTO 32		
	215 ACX						
	216 PRBUF				265*LBL 33		
	217 FIX 3				266 3		
	218 RCL 01				267 ST- 00		SET POINTER
	219 RCL 14		ALL STOCKS PRINTED?				
	220 X=Y?				268*LBL 34		
	221 RTH				269 CLA		
	222 1				270 ARCL IND 00		NAME
	223 ST+ 01		ADJUST POINTERS		271 ASTO 12		
	224 4				272 ISG 00		
	225 ST+ 02				273 RCL IND 00		* SHARE, SALE PRICE
	226 GTO 26				274 STO 13		DECODE
					275 INT		
	227*LBL 30		NEW STOCK HEADING		276 XEQ 23		
	228 "NEW STOCK"				277 STO 01		
	229 XEQ 99				278 RCL 13		
	230 GTO 16				279 FRC		
					280 XEQ 19		
	231*LBL 31		SELL CHECK HEADING		281 STO 02		
	232 "SELL CHECK"				282 ISG 00		
	233 XEQ 99				283 RCL IND 00		DSBUY, DT NOW
	234 16.25				284 STO 13		DECODE
	235 STO 00		SET POINTER		285 INT		
					286 XEQ 23		
	236*LBL 32				287 STO 03		
	237 RCL IND 00		* SHARE, SALE PRICE		288 RCL 13		
	238 FRC				289 FRC		
	239 XEQ 19				290 XEQ 19		
	240 X=0?		IF ZERO STOP AT "END SELL CHECK"		291 STO 04		
	241 GTO 35				292 ISG 00		
	242 STO 01				293 RCL IND 00		PURCH H. \$ NOW
	243 2				294 STO 13		DECODE
	244 ST+ 00				295 INT		
	245 RCL IND 00		PURCH H. \$ NOW		296 XEQ 23		
	246 FRC				297 STO 05		
	247 XEQ 19				298 RCL 13		
	248 RCL 01		IF SALE PRICE IS LESS THAN "K EQUAL TO CURRENT PRICE PRINT OUT DATA FOR SALE		299 FRC		
	249 X=Y?				300 XEQ 19		
	250 GTO 33				301 STO 06		NUMBER: ZERO
	251 RCL IND 00				302 X=0?		GO TO "END SELL CHECK"
	252 STO 13				303 GTO 35		
	253 INT				304 RCL 01		
	254 XEQ 23				305 RCL 06		
	255 STO 01		CHECK FOR LOSS		306 *		
	256 RCL 13				307 STO 09		TOTAL CURRENT VALUE
	257 FRC				308 RCL 01		
					309 RCL 05		

PROGRAM LISTING

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STEP/ LINE	KEY ENTRY	KEY CODE (67/97 only)	COMMENTS	STEP/ LINE	KEY ENTRY	KEY CODE (67/97 only)	COMMENTS
310 *				357+LBL 97			INPUT ROUTINE
311 STO 10			TOTAL	358 CF 22			
312 RCL 09			PURCHASE	359 1			
313 RCL 10			PRICE	360 ST+ 00			
314 -				361 RCL IND 00			
315 STO 11			\$ GAIN	362 *t = *			
316 CLA				363 PROMPT			
317 SF 12			NAME	364 STO IND 00			
318 ARCL 12				365 ARCL X			
319 PRA				366 PRA			
320 CF 12				367 RTN			
321 RCL 01			PRINTOUT				
322 *SHARE-			DATA	368+LBL 98			OUTPUT ROUTINE
323 XEQ 98				369 SF 21			
324 RCL 05				370 *t = *			
325 *\$ BUY-				371 ARCL X			
326 XEQ 98				372 PRA			
327 RCL 02				373 RTN			
328 *\$SELL-							
329 XEQ 98				374+LBL 99			TITLE ROUTINE
330 RCL 06				375 ADV			
331 *\$ NOW-				376 SF 12			
332 XEQ 98				377 PRA			
333 RCL 03				378 CF 12			
334 *DJBUY-				379 ADV			
335 XEQ 98				380 END			
336 RCL 04							
337 *DJNOW-							
338 XEQ 98							
339 RCL 09							
340 *\$ NOW-							
341 XEQ 98							
342 RCL 10							
343 *\$ BUY-							
344 XEQ 98							
345 RCL 11							
346 *\$GAIN-							
347 XEQ 98							
348 2			SET POINTER				
349 ST+ 00			NEXT STOCK				
350 ADV							
351 GTO 32							
352+LBL 35			END SELL				
353 *END SELL CHECK-			CHECK ROUTINE				
354 PRA							
355 ADV							
356 STOP							

PROGRAM REGISTERS NEEDED: 130

ROW 1 (1 : 3)



ROW 2 (4 : 9)



ROW 3 (9 : 12)



ROW 4 (12 : 17)



ROW 5 (17 : 22)



ROW 6 (22 : 25)



ROW 7 (25 : 27)



ROW 8 (27 : 32)



ROW 9 (32 : 37)



ROW 10 (38 : 42)



ROW 11 (42 : 48)



ROW 12 (49 : 55)



ROW 13 (55 : 59)



ROW 14 (59 : 62)



ROW 15 (62 : 65)



ROW 16 (65 : 70)



ROW 17 (70 : 78)



ROW 18 (79 : 83)



ROW 19 (84 : 91)



ROW 20 (91 : 99)



ROW 21 (99 : 106)



ROW 22 (106 : 108)



ROW 23 (108 : 111)



ROW 24 (111 : 116)



ROW 25 (117 : 123)



ROW 26 (123 : 125)



ROW 27 (125 : 129)



ROW 28 (129 : 135)



ROW 29 (136 : 144)



ROW 30 (144 : 153)



ROW 31 (154 : 159)



ROW 32 (159 : 165)



ROW 33 (166 : 173)



ROW 34 (174 : 180)



ROW 35 (180 : 185)



ROW 36 (185 : 189)



ROW 37 (189 : 195)



ROW 38 (195 : 199)



ROW 39 (199 : 201)



ROW 40 (201 : 202)



ROW 41 (202 : 208)



ROW 42 (209 : 216)



ROW 43 (216 : 225)



ROW 44 (226 : 228)



ROW 45 (228 : 232)



ROW 46 (232 : 234)



ROW 47 (234 : 240)



ROW 48 (241 : 247)



ROW 49 (248 : 255)



ROW 50 (256 : 263)



ROW 51 (264 : 270)



ROW 52 (271 : 278)



ROW 53 (279 : 286)



ROW 54 (286 : 294)



ROW 55 (295 : 303)	
ROW 56 (303 : 314)	
ROW 57 (315 : 322)	
ROW 58 (322 : 325)	
ROW 59 (325 : 329)	
ROW 60 (329 : 334)	
ROW 61 (334 : 337)	
ROW 62 (337 : 341)	
ROW 63 (341 : 345)	
ROW 64 (346 : 350)	
ROW 65 (351 : 353)	
ROW 66 (353 : 357)	
ROW 67 (358 : 363)	
ROW 68 (364 : 370)	
ROW 69 (370 : 376)	
ROW 70 (377 : 380)	

