

Intro To Computers

Excel #16 – Crockett Family Portfolio

Objective: Create an investment portfolio for the Crockett family including charts that display where the family's money is currently being invested and how their portfolio has performed in recent years.

1. In your *Intro to Computers* folder, create a folder titled *first_last_excel_16* using your first and last name.
2. Download the *excel_16.zip* file from <http://www.missblomeyer.com>. Copy *Crockett.xlsx* and put it in your *first_last_excel_16* folder. Delete *excel_16.zip*.
3. Open *Crockett.xlsx* and make the following changes:
 - a. In the Composition worksheet, select the range A3:B8 and insert a 2D pie chart. Move and resize the pie chart to the range D1:G9 in the Portfolio Report worksheet.
 - b. Move the legend to the left side of the chart area. Change the chart title to **Composition** in a 12 point font. Change the fill color of the Cash slice to yellow. Add data labels that show the percentage of each pie slice with 2 decimal places outside of the pie chart. Set the font size of the labels to 8 points.
 - c. Change the pie chart to a 3D pie chart and set the 3D rotation of the x-axis to 230° and the y-axis to 40°.
 - d. In the Sector Weightings worksheet, select the range A3:D15 and insert a 2D clustered column chart. Move and resize the column chart to cover the range A12:D25 in the Portfolio Report worksheet.
 - e. Change the font size of both axis labels and legend to 8 points. Insert the chart title **Sector Weightings** over the plot and set its font size to 12 points. Change the format of the percentages in the vertical axis to display no decimal places. Overlay the legend at the top of the chart and then change its fill color to white and insert a solid border around the legend.
 - f. Change the chart type of the S&P 500 series to a line chart, remove the line connecting the markers in the chart, and then change the marker type to a solid horizontal line of size 10.
 - g. Change the fill color of the columns for the Portfolio data series to the theme color Purple, Accent 4, Lighter 60%. Set the gap width of the columns in the Portfolio data series to 30%.
 - h. In the Portfolio Value worksheet, select the range A3:B127 and then insert a 2D area chart. Move and resize the chart to cover the range D28:G42 in the Portfolio Report worksheet. (You may need to scroll down to find the chart in the Portfolio Report worksheet.)
 - i. Remove the chart legend. Set the font size of the chart title to 11 points and the font size of both axes labels to 8 points. Change the fill color of the data series to the theme color Purple, Accent 4, Lighter 60%.
 - j. Modify the category axis so that the vertical axis crosses at the maximum date. (Hint: use the Axis Options in the Format Axis dialog box. Look towards the bottom for *Vertical axis crosses*.)
 - k. Set the major tick mark interval at two years and the minor tick mark interval at one year. Insert vertical gridlines for the minor tick marks. Use a custom format that displays the category axis date values as four-digit year values. (Hint: in the Format Axis dialog box, click on Number. In the box that says mm/dd/yyyy, change it to yyyy.)
 - l. Zoom the Portfolio Report worksheet to 80%.
 - m. In the Portfolio Value worksheet, select the range A3:B127 and insert a 3D *area* chart. Move the chart to a new chart sheet named **Cover Sheet**.
 - n. Change the chart style to Style 34. Remove the horizontal, vertical and depth axes. Remove the chart legend.

- o. For the 3D rotation, set the x-axis to 60° , the y-axis to 10° , the perspective to 40° , and the depth of the base to 2000.
 - p. Change the chart title to **Crockett Family Portfolio** and change its font size to 40 points.
 - q. Insert two 5-pointed stars, one directly to the left and the other directly to the right of the chart title. Set the height and width of each star to 0.3". Make the Fill color of both stars White, Background 1, Darker 35%. Align the middle of the two stars and group them into a single object.
 - r. Make sure the worksheets are in the following order: Cover Sheet, Portfolio Report, Composition, Sector Weightings, and Portfolio Value .
 - s. Select the Cover Sheet, save Crockett.xlsx and exit out of Excel.
4. Zip your *first_last_excel_16* folder. Turn in your *first_last_excel_16.zip* file.