

Electronic Education Report



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First View of FY2021 State Budgets Shows Common Education Priorities

As governors across the states begin first-quarter rollouts of budget proposals for fiscal 2021, some common themes are seen across budget proposals in some big states. Governors are seeking funding to support teacher pay raises, to balance funding across districts in order to address educational inequities and more money to provide access to preschool for more students.

California

The budget proposal for fiscal 2021 put forth by Gov. Gavin Newsom includes \$3.3 billion (\$1.4 billion ongoing and \$1.9 billion one time in new funding) for school districts under Proposition 98, which requires a minimum percentage of the state budget to be spent on K-12 education. Per student funding would increase 1.4% in the \$84 billion K-12 budget.

[See 'Budget' on p. 6](#)

BrainPop & NetDragon Step Up Amid Coronavirus

Amid glowing global concerns about the spread of the coronavirus, China and Japan are closing schools, but U.S. school districts are just beginning to make plans. The result may be no significant changes needed, more online courses, more homeschooling or something else that is to be determined, but there are some early stirrings in the market.

BrainPOP (New York) in February produced a four-minute video that explains what the virus is and what children can do. It is being shared as part of the PBS News Hour Extra and is available with discussion questions and a quiz for classrooms.

BrainPOP also has offered any school closed due to the coronavirus free, unlimited use of its product suite

[See 'NetDragon' on p. 5](#)

Esports Enters the Classroom

Esports, multiplayer video games played competitively for spectators, is catching on in schools. One reason is the work of the North American Scholastic Esports Foundation, a nonprofit working to connect play and learning through a free system of clubs, coaching and curriculum.

Esports is like other spectator sports but with gaming consoles and computers. Proponents see Esports as a platform where students acquire transferable communication, collaboration and problem-solving skills and are exposed to potential career paths.

Kevin Brown, an Esports program specialist at NASEF who also works for the

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EER PULSE

U.S. Education Funding, Fiscal Year 2017

- \$705.3 billion in total, up 1.9% from fiscal 2016.
- 8.1% from federal government, 91.9% from state and local funding.
- \$13,962 average funding per pupil.

Source: National Center for Educational Statistics, February 2020.

Orange County (CA) school district under a NASEF grant, shows schools how they can get started with Esports and evangelizes for Esports in multiple languages.

Brown also is the creator of a four-year high school course track of English classes for business through Esports. He told *EER* that he looked at the California standards and the components of English classes and laid them against the four domains of work identified by NASEF—strategist, organizer, entrepreneur, content creator—and career pathways.

For example, freshman English explores what is a narrative, typically starting with a hero's journey—that is similar to a video game, Brown said. Fourth-year English students pull off an Esports tournament on their campus as a summative project and draw on skill sets developed in earlier years for the writing of business plans and market-

ing plans and the design of products and advertisements.

NASEF is supported by philanthropy, so all curriculum and services provided to schools are free. Esports in classrooms is sprinkled across 44 states and Canada, according to Brown, with the only required commitment from schools being the introduction of an Esports club for students. Models of use are not mandated, instead teachers are shown how to use the tools and implement them as they see fit.

Some schools are adding sections of Esports English alongside the traditional English track; in other schools, teachers take Esports elements and add them to their standard English courses. Brown said because the courses align with California standards, which are the Common Core State Standards, they align with standards in a majority of the states.

Expanding to Middle School

As educators became familiar with Esports, they also requested curriculum for middle school, prompting development of a nine-week course that introduces the domains of Esports and related projects.

Brown said Esports works well in middle school where teachers may teach multiple subjects and can float Esports concepts across the subjects. Students can learn coding to create a video game and how to craft an advertisement for the video game that targets certain audiences, which can teach students about language to use for persuasion and how elements of color influence composition.

Brown compared Esports to “chocolate broccoli,” saying students will come to experiment and succeed if something that is good for them is coated in something they want. He also touted the inclusivity of Esports. When a middle school group he was working with was tasked with coming up with a name and logo for their endeavors, they chose: Mages of the Tech Lab—All Minds, All Kinds. The best video games are inherently social and can level the playing field and challenge stereotypes, he said.

Beyond English, Brown sees broad applicability for Esports in career and technical education and across the STEM fields and he hears from teachers asking for curriculum for that. NASEF is supporting the curriculum development work of 24 middle and high school teachers who are using their classrooms as labs for curriculum



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development.

Sparkling Company Interest

Rich Henderson, director of global education solutions at technology hardware provider Lenovo (Hong Kong/Morrisville, NJ) told *EER* he is seeing growing interest in gaming in the context of the school environment and that Lenovo is interested in building a school solution around Esports. The benefits, he said, are inclusion, giving underserved students motivation and opening the path to workforce readiness

Raigan Irwin-McCabe, vice president of marketing at technology-based solutions provider Trox (Phoenix), told *EER* companies have been slow to realize the opportunity Esports provides, but Trox was the first to recognize the trend and identify partners that understand what needs to be done. Those partners include manufacturers of gaming units and supplier of furniture and sound equipment.

With Esports, she said students learn observation, problem-solving and critical thinking skills while doing real-life work like broadcasting and marketing. They also break down barriers and learn collaboration and strategy and can earn college scholarships, she said. ■

Discovery Education Expands Partnerships with School Districts

Discovery Education (Charlotte, NC) in February struck a new partnership with the North Middlesex (MA) regional school district, which serves 3,100 students, under which Discovery's social studies curriculum will be used in grades 6-8 across the district.

To support efforts to create learning environments that support an inquiry-based approach to social studies instruction and to provide lessons aligned to the 2018 Massachusetts History and Social Studies Framework, North Middlesex selected Discovery's social studies techbooks.

Discovery Education Experience

Discovery Education will provide the Andover (MA) public schools, where 6,000 students are educated, with the Discovery Education Experience, a digital service that supplements instruction across all K-12 subject areas.

To support a focus on providing innovative instruction that prepares students for success beyond the classroom, the district selected the latest iteration of Discovery's Streaming Plus service, which provides standards-aligned content that is assignable and can be bookmarked and saved for later use and remixed to meet the varying needs of diverse student populations in a secure environment.

To help APS educators integrate their new digital resources into classroom instruction in the coming school year, Discovery Education will provide professional learning opportunities where educators can learn best practices for integrating technology and digital content into teaching and learning in ways designed to maximize the power of their new resources, increase student engagement in instruction, and improve students' academic achievement.

The Andover partnership also offers APS teachers access to the Discovery Education Community, a global network of education professionals.

Woodward (OK) public schools, which educate 2,500 students, in January also selected the Discovery Education Experience, as part of an initiative to increase student achievement and close achievement gaps. Educators there also will have access to the Discovery Education Community.

The North Carolina Virtual Public School in January extended its eight-year partnership with Discovery, giving its students access to the Discovery Education Experience and its educators continued access to the Discovery Education Community.

In the past year, more than 57,000 students enrolled in NCVPS courses. NCVPS offers six different educational programs: traditional, occupational course of study, flex learning, math intervention, middle school, and English-language learner. ■

ELL Population in U.S. K-12 Schools Grows

The number of English-language learners in the U.S. grew 28.1% between the 2000-2001 school year and the 2016-2017 school year, with the percentage of ELLs enrolled in U.S. schools rising by 1.5 percentage points, according to data released by the National Center for Education

Statistics in February.

During the 2000–2001 school year, a total of 3.8 million English learners were enrolled in public schools in kindergarten through grade 12 in the 50 states and the District of Columbia, representing 8.1% of total student enrollment. By the school year 2016–2017, the English-learner population had grown to 4.9 million students, representing 9.6% of total student enrollment.

Forty-three states saw increases in their ELL populations as a percentage of total student enrollment during that period, ranging from a 0.1 percentage point increase in Hawaii and South Dakota to a 7.9 percentage point increase in Kansas. The ELL student increase ranged from 315 in Wyoming to 351,559 in Texas.

Seven states and the District of Columbia saw declines in their ELL populations as a percentage of total student enrollment, ranging from a decrease of 8.8 percentage points in Arizona to a decrease of 1.9 percentage points in Utah. The ELL decrease ranged from 60 in Hawaii to 219,147 in California. ■

Pearson Meets Revenue Expectations and Exceeds EPS Expectations

Pearson (London/Hoboken, NJ) revenue in 2019 was \$4.95 billion versus \$5.53 billion in 2018. On a headline basis for 2019, Pearson revenue of £3.87 billion declined 6%, down 9% at constant currency and was flat on an underlying basis.

In terms of digital revenue, Pearson said 36% of its overall revenue came from digital in 2019, 30% from digitally enabled, 34% non-digital.

Pearson generates most of its sales in North America—62% of sales in the U.S. and 4% in Canada in 2019. Revenue in the North America segment declined 9% topline, down 13% at constant currency and down 3% in underlying terms. In dollars, North America sales declined 13.1% to \$3.24 billion.

Courseware, mainly U.S. higher education courseware, is the driver of North America sales, accounting for 42.4% in 2019.

Pearson in 2019 sold its U.S. K-12 courseware business to

PEARSON FINANCIALS, 2019 vs. 2018¹ (\$ in 000,000)

	2019	2018	% Chg. ²
Pearson Revenue	\$4,952	\$5,533	-10.5%
Co. Operating Inc./Loss	\$352	\$741	-52.5%
Operating Margin	7.1%	13.4%	-6.3
Co. Adj. Op. Income	\$744	\$732	1.6%
Adj. Operating Margin	15.0%	13.2%	1.8
North America Revenue	\$3,244	\$3,731	-13.1%
NA Courseware	\$1,376	\$1,924	-28.5%
NA Assessments	\$1,119	\$1,093	2.3%
NA Services	\$749	\$713	5.0%
NA Adj. Op. Income	\$462	\$485	-4.7%
Adj. Operating Margin	14.2%	13.0%	1.2

¹ \$ figures calculated by converting British £ at exchange rates of 1.28 in 2019 and 1.34 in 2018.

² Year-over-year headline percent changes in \$ are not the same as in £. On a headline basis for 2019, Pearson revenue of £3.87 billion declined 6%, down 9% at constant currency and was flat on an underlying basis. NA revenue of £2.53 billion was down 9% headline, -13% at constant currency, and -3% underlying.

Source: Pearson financial report; EER conversions of £ to \$.

private equity Nexus Capital Management, one year after classifying the business unit as held-for-sale in February 2018. Revenue for the North America school courseware business in the sale-shortened 2019 was £86 versus £378 in 2018.

Student Assessment, which chiefly is K-12, saw underlying revenue decline 1% in 2019. Offsetting that, Pearson saw good growth in virtual schools (up 6% underlying), online program management (up 4% underlying) and VUE professional certification (up 9% underlying).

Pearson's virtual school business served 76,000 full-time equivalent students through 42 virtual partner schools in 28 states in 2019, up 5% from the prior year. In the 2019–2020 school year, six statewide partner schools opened in the states of California, Minnesota, Oregon, Tennessee and Washington. One contract, with North Carolina, ended.

Looking forward, Pearson hopes to grow its virtual school business by increasing penetration in existing states and

by targeting states with high-growth potential.

Beginning in 2020, Pearson set up a new reporting structure which will put its virtual school business in a Global Online Learning segment and puts U.S. student assessment in a Global Assessment segment. ■

HMH Education Drives Revenue Growth in 2019

Houghton Mifflin Harcourt (Boston) generated \$1.39 billion in revenue in 2019, up 5.2% from 2018, driven by strong results in the company's Education segment where revenue increased 7.8% to \$1.21 billion in 2019.

The growth in Education was driven by strong performances in both core solutions, up 44%, and in extensions, up 11%, which includes supplemental materials, intervention and professional learning resources. Education billings were up 26.7% to \$1.41 billion in 2019.

HMH captured a 56% share of the Texas K-8 reading adoption, on the strength of its Into Reading and Into Literature programs.

"We now have digital, adaptive and personalized solutions on a single platform and we are uniquely qualified to meet the needs of students across the entire achievement spectrum," CEO Jack Lynch said.

For 2020, HMH projects company billings to be at the low end of a \$1.5 billion to \$1.65 billion range with free cash flow between \$65 million and \$90 million. ■

NetDragon, cont'd. from p.1

during the close. The company suggests using BrainPOP's animated movies and assessment materials for distance learning, project and homework support and student tracking.

At the Epicenter

NetDragon Websoft (Changle, Fujian, China) in February introduced a new service plan for its online education platform One Stop Learning to provide live streaming of courses to more than 10 million users free of charge. The moves came in response to a call from China's Ministry of Education to "build online cloud classes to ensure students can study at home when face-to-face classes are not allowed."

A Continuous Learning amid School Suspension service of One Stop will provide information about coronavirus and public health measures and also will support teachers' class preparation and teaching, online assignments and exams, live-communication between schools and parents, academic research, and operational management to help users to accomplish their daily work.

In addition to One Stop Learning, NetDragon is offering its integrated software for lesson preparation and delivery, 101 Education PPT, to all teachers in China free of charge, to facilitate online lesson preparation and delivery. Kami English, an oral English teaching and learning assistant system for K-12 students introduced by NetDragon's subsidiary Chivox, is opening all online

HOUGHTON MIFFLIN HARCOURT Q4 AND FULL-YEAR FINANCIAL RESULTS, 2019 VS. 2018

(\$ in 000)

	Q4 2019	Q4 2018	Chg.	2019	2018	Chg.
Company Revenue	\$241,475	\$249,038	-3.0%	\$1,390,674	\$1,322,417	5.2%
Education	\$189,387	\$188,754	0.3%	\$1,210,646	\$1,122,689	7.8%
Co. Operating Loss	-\$108,947	-\$74,711	NM	-\$163,164	-\$90,525	NM
Adjusted EBITDA	-\$3,757	\$2,304	-263.1%	\$165,738	\$192,128	-13.7%
Education	-\$62,328	-\$52,880	NM	-\$45,940	-\$4,320	NM
Education Op. Margin	-32.9%	-28.0%	NM	-3.8%	-0.4%	NM
Adjusted EBITDA	\$8,001	\$2,553	213.4%	\$196,907	\$210,604	-6.5%

Source: Houghton Mifflin Harcourt financial reports.

VIP-exclusive services free of charge to all students and teachers in primary and secondary schools across China, as well as extending VIPs' subscription period, to ensure students can carry on with their English learning.

In collaboration with Hubei Province, NetDragon established the Hubei Education Cloud Platform, which has rolled out free education services, including online lectures, online teaching videos and micro lessons, to more than one million teachers and students in Hubei Province. The construction and testing of the platform were completed in three days.

NetDragon also is offering online interactive education platform and resources to teachers and students in Hong Kong and Macau to continue virtual schooling for free. In Hong Kong and Macau, classes are tentatively suspended through March or later. NetDragon subsidiary Edmodo will support online interactive learning during the period. On the Edmodo platform, teachers can share reading materials and educational videos with their class, along with online discussions to encourage independent learning among students, so they can keep up with their learning progress.

NetDragon Partners on Early Education

NetDragon in February entered into a strategic cooperation agreement with the early childhood education service provider RYB Education (Beijing, China). RYB will leverage NetDragon's technology to integrate both parties' online and offline resources.

The two companies plan to jointly develop early childhood educational products, as well as explore the field of children's English-language learning using an online-merge-offline model. With its technological know-how in gamification, NetDragon will support RYB in upgrading the content and courses offered at its play-and-learn centers.

Funding Raised

NetDragon in February issued 33 million shares at a price of Hong Kong \$23.70 per share, raising U.S. \$100 million. Participants in the round included traditional investment funds and hedge funds in China and elsewhere.

NetDragon intends to use the net proceeds for general corporate purposes and to fund the expansion of its edu-

cation business, including capitalizing on revenue opportunities globally, particularly in the emerging markets, as well as user scaling and monetization of the online education ecosystem. ■

Budget, cont'd. from p.1

Most of the ongoing funding increase is to provide a cost of living adjustment for the local control funding formula, but there are some one-time initiatives, with the largest focused on addressing longstanding workforce shortages, student poverty, and student achievement gaps.

The governor would target \$900 million toward teacher recruitment and retention in low-income schools that chronically have difficulty in hiring and keeping qualified educators, including a \$100 million grant program to offer \$20,000 stipends to teachers who agree to work in low-income schools for at least four years.

Newsom proposed \$895 million in services for students with disabilities, with an emphasis on early intervention and screening for preschoolers. An additional \$4 million would go toward dyslexia research.

Florida

Gov. Ron DeSantis proposed a \$94.1 billion budget for fiscal 2021, a 0.3% increase from the 2020 General Appropriations Act, that allocates \$26.05 billion for education.

The budget includes \$900 million to recruit and retain classroom teachers and principals, with \$600 million to raise the minimum salary for full-time classroom teachers to \$47,500, which would provide more than 101,000 teachers with a pay raise. Additionally, \$300 million is recommended for the Florida Classroom Teacher and Principal Bonus programs.

The budget invests \$25 million in key workforce development initiatives, mainly at the postsecondary level

New York

New York state, which has increased funding for education by 43% since 2012, would add \$826 million to school aid, a 3% raise that brings the annual investment to \$28.5 billion, under the proposed 2021 budget of Gov. Andrew Cuomo.

In New York, wealthier school districts spend approximately \$36,000 per student as opposed to \$13,000 per student at poorer school districts. To prioritize poorer schools and build education equity, the Governor proposed a new School Aid Funding Formula to properly distribute funds and build up underserved school districts.

The proposed budget also includes an additional \$15 million investment in prekindergarten for 3- and 4-year old students to expand access in high-need districts. It includes \$10 million to fund a fourth round of Empire State After-School awards that would provide an additional 6,250 students with public after school care in high-need communities and districts with high rates of childhood homelessness.

The budget would commit an additional \$6 million to create new early college high school programs that target communities with low graduation or college access rates and would align new efforts with in-demand industries such as technology, sports management and finance.

Illinois

Illinois Gov. J.B. Pritzker's 2021 \$42 billion state budget ties education support, pension funding and other programs to the fate of a constitutional amendment authorizing a graduated income tax to pay for more spending. Pritzker proposed \$350 million more in equitable funding for K-12 schools.

Pennsylvania

Gov. Tom Wolf's 2020-21 \$36.1 billion budget would raise state spending by 4%, while providing a two-fold increase in funding for the state-owned universities. Wolf's administration also is proposing a requirement that all public schools offer full-day kindergarten for every student.

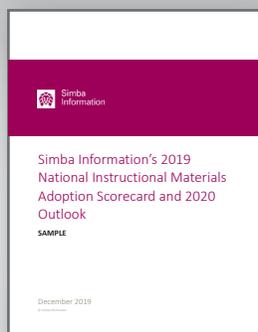
The proposed budget includes more than \$400 million in new state aid to public schools, though about \$280 million of that would depend on a package of charter school reforms that to date has struggled to win a critical mass of support from the state's General Assembly.

One focus is charter school reimbursements, which the Pennsylvania School Boards Association said are their members' biggest budget pressure and are based on a skewed and unfair funding equation. School advocates also say charter schools disproportionately siphon cash away from the poorest districts. Republican lawmakers have maintained the status quo despite complaints over time.

Georgia

After a stretch of largely uninterrupted growth that saw state revenues climb by an annual average of 6% between fiscal years 2011 and 2019, many of Georgia's agencies have been asked to make mandatory spending cuts in response to slowing economic activity.

2019 National Instructional Materials Adoption Scorecard and 2020 Outlook



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2019 National Instructional Materials Adoption Scorecard and 2020 Outlook provides a singular look at sales by subject in particular states—those states classified as adoption states, which conduct statewide reviews and purchasing processes for instructional materials.

This report features an all new Publisher Adoption Scorecard, which ranks the leading publishers by sales, and a look at the opportunities that will open up in 2020 through 2023.

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The \$28.1 billion budget for fiscal 2021 proposed by Gov. Brian Kemp includes \$11.3 billion for PreK-12 education and includes \$356.9 million to increase salaries for certified teachers by \$2,000 and to provide a \$1,000 salary increase for non-certified personnel earning less than \$40,000 per year, effective July 1, 2020.

The budget proposal includes \$143.5 million to cover student enrollment growth. Student enrollment will reach 1.75 million in FY 2021, with more than 132,000 teachers and administrators employed across the state. It also includes \$50.5 million for the State Charter Schools Commission to increase state funding provided to charter schools.

Michigan

Michigan Gov. Gretchen Whitmer's proposed 2021 \$69.1 billion state budget recommendation is a 3.9% increase from the fiscal year 2020 budget and includes a school aid fund total of \$15.9 billion, up 4.9%.

The school aid fund includes a base funding increase of \$150 to \$225 per pupil, which equates to \$8,336 per pupil for districts at the minimum and \$8,679 per pupil for districts at the maximum, reducing the gap between the highest and lowest funded districts to \$343 per pupil.

The Governor's plan would increase investments to economically disadvantaged students by \$60 million, special

education students by \$60 million, and English-language learners by \$5 million. The budget also includes funding to enroll an additional 5,000 children in the Great Start Readiness preschool program, which currently serves 38,000 children statewide. The funding would target areas with the highest levels of academic need and add extra funding to the early literacy program to help to train literacy coaches. ■

For an in-depth look at U.S. elementary and secondary policy and funding, check out Simba Information's PreK-12 Policy & Funding Outlook, 2020-2021, publishing in March. For more information or to purchase the report, call 888-297-4622 or e-mail customerservice@simbainformation.com.

News Briefs ...

- **Trox** (Phoenix) is the new name for the combined CDI Technologies and Troxell Communications, which in July 2019 merged to leverage scale, synergies and a broader portfolio of products and classroom technology from more than 500 vendors. Post-merger, the business was known as Troxell-CDI, but was renamed in February.

EER Stockwatch 2020

Share Price Values for Instructional Technology Providers, Feb. 19–March 4, 2020 (closing prices)

	Ticker	Feb. 19	Feb. 26	March 4	% Chg. 2/19-3/4	% Chg. YTD
Boxlight	BOXL	\$1.27	\$1.13	\$1.02	-19.7%	-10.5%
Houghton Mifflin Harcourt	HMHC	\$6.60	\$5.75	\$5.34	-19.1%	-15.5%
K12 Inc.	LRN	\$17.21	\$16.35	\$20.34	18.2%	-0.9%
Pearson	PSO	\$7.41	\$7.37	\$7.42	0.1%	-13.2%
Rosetta Stone	RST	\$20.31	\$17.65	\$17.91	-11.8%	-2.0%
Scholastic	SCHL	\$34.68	\$31.61	\$33.64	-3.0%	-13.1%
Average for Group		\$14.58	\$13.31	\$14.28	-2.1%	-8.4%
NASDAQ Nat'l. Mkt. Composite Index		9,817.18	8,980.78	9,018.09	-8.1%	-0.2%

Rosetta Stone and Scholastic listed on the NASDAQ; BOXL on NASDAQ Capital Market; K12 Inc. and Pearson on NYSE.
Source: Yahoo Finance and Simba Information.

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