

How Successful Was My Investment Strategy?

Suggested Grade & Mastery Level

High School - all levels

Suggested Time

One or two class periods for presentation preparation

Teacher Background

In evaluating the students' activities, it will be important to take into account the students' level: novice, apprentice, master, or grand master. InvestWrite, the innovative national writing competition is an excellent culminating activity. InvestWrite questions can be included in the student's presentations, www.InvestWrite.info.

Performance Objectives

Students will be able to:

- Draw supported conclusions as to whether their strategy in preparing their portfolio was successful and what investment changes they might have made to improve portfolio performance.
- Generate a detailed report including support material.
- Deliver a convincing presentation.
- Give and receive constructive criticism.
- Evaluate the work of other team members and other students.

Subject Areas

Mathematics, Social Studies, Economics, English Language Arts, Technology, Business

Materials

- **Fact Sheet 1: Presentation and Portfolio Requirements**
- **Rubric 1: Portfolio Rubric (for teacher use)**
- **Rubric 2: Presentation Rubric (for teacher use)**
- **Rubric 3: Peer Review Rubric (for students)**
- **Activity Sheet 1: Partner Evaluation Sheet**
- **Individual Scores from Stock Market Project**

Springboard

Before we begin the presentations, I would like some feedback on your experience with The Stock Market Game. How has the experience of playing The Stock Market Game changed the way you think about investing? Has your experience with The Stock Market Game made you more likely or less likely, to invest in the stock market? Or has it not influenced your opinion?

Procedure

The SMG teams should review trades (most/least successful), and team journal, then write notes on what they would do differently.

Using **Fact Sheet 1: Presentation and Portfolio Requirements** as a guide, prepare your presentation, you may want to review and include the current InvestWrite prompt. Each team will make a five to 15-minute presentation on their investment strategy. Be sure to include: Where you have had your greatest success/your least success? If you were starting over what part of your strategy would you change?

Have two other teams give the presenting team feedback using **Rubric 3: Peer Review Rubric**, or another rubric found in the Assessment Section of the SMG Teacher Support Center. Critique student feedback to ensure that the students know how to provide constructive feedback. Have each team member complete **Activity Sheet 1: Partner Evaluation Sheet**. See attached **Rubrics 1 & 2** for easy grading system by teacher.

Note: Total number of project points will depend on the number of rubrics and evaluation forms used by teacher.

[Novice](#) and [Apprentice](#) Levels:

Presentation can be in PowerPoint, a poster or any other creative method. It must include all stocks purchased with a rationale for each. It should address: What industry sectors were included and how did your stocks compare to others in that sector? How did your team determine what would be included in the portfolio? Have the students address the InvestWrite question during the presentation.

[Master](#) and [Grand Master](#) Levels:

Presentation can be in PowerPoint, a poster or any other creative method. It must include all stocks purchased with a rationale for each. In addition, each team should discuss current events and current economic factors that affected their portfolios. For example, did the Federal Reserve raise interest rates during this time? What is the rate of inflation? Was there a war, a hurricane? What was the result on your portfolio?

What industry sectors were included and how did your stocks compare to others in that sector? How did your team determine what would be included in the portfolio? Students should use charts and graphs to explain their team's decisions. Have the students address the InvestWrite question during the presentation.

Assessment

Have students answer the following questions in order to demonstrate peer-to-peer learning from the presentations.

Name two investments that you heard about from other teams that you would now consider for your team's portfolio.

Name one company that you heard about today that had its stock prices impacted by current events. What was the event and how did it impact the company?
In your opinion, which team had the best investment strategy? Explain

Have the students write a page that addresses one of the following:

There is a good chance you may participate in The Stock Market Game again, (or that you may have funds of your own to invest soon.) Write a memo to yourself that includes a list of what



you want to remember about savings and investing. Include your risk tolerance type and your individual strategy.

Your teacher will be participating in The Stock Market Game next year. Write a letter to one of next year's teams advising them on how to get the most from the game.

Application

InvestWrite, an innovative national writing competition, produced by The Stock Market Game program, adds a critical thinking component to help reinforce concepts learned in the classroom. Visit www.InvestWrite.info to download this semester's questions. Students will submit their essays to you; you select the three top essays to enter in the national competition.