

Fact Sheet 1 - Presentation and Portfolio Requirements

Portfolio Requirements

- 1. Cover Page (should contain the following) 5 pts**
 - Names of each team member and their responsibilities on the team
 - Names of all the companies company researched and purchased in the team's portfolio
 - 2. Rationale 20 pts**
 - What investment strategy did your team decide to follow? Why?
 - What influenced your transactions?
 - What were some major business or world events that occurred during the SMG game?
 - How did those things influence your trading activities or impact your stated strategy?
 - What is your overall reaction to the success or lack of success of appreciation of the team's investment portfolio?

Teams should summarize this portion from their previously completed rationale forms they developed for each company prior to purchasing the company's stock.
 - 3. Team Stock Worksheets recording closing prices for the team's portfolio each week 20 pts**
 - Instructor will check that these forms through out the game. Instructors might give up to 5 points to a team each time portfolios are checked for a total of 20 points.
 - 4. Graph of each of the team's stocks showing movement over the past 10 weeks 30 pts**
 - Graphs may be done based on daily or weekly closes. Teachers may decide how they wish to handle this based upon time on the activity during the class.
 - One graph needs to illustrate the team's portfolio's movement by overall value
 - Teachers might recommend that students chart the Dow Jones Industrial Average and have the students compare their portfolio performance with the Dow's performance to see if there is any correlation.
 - 5. A copy of the team's weekly portfolio 10 pts**
 - Every Friday print the Account Summary and Account Holdings screens
 - 6. Conclusion 15 pts**
 - Each group member should complete a paragraph explaining what he or she learned by participating in the stock Market Game.
- SUBTOTAL 100 pts**

Part 2 Presentation Requirements

This is a suggested grading rubric for the classroom teacher and students.

1. Visual Aids

10 pts

- Can either be posters with mounted graphs or PowerPoint.
- Will be judged by accuracy and organization of graphs and any visuals produced.
- Must include a hand written graph showing the portfolio's progress over the ten weeks.
- Also must include a Spreadsheet with computer-generated graph.

2. Presentation

10 pts

- Neat and organized graphs and charts showing the performance of all investments.
- Quality and number of visual aids presented by the team
- Students must be allowed time in class to practice their presentation in class.

3. Time Limit

5 pts

- 15 minutes maximum
- Present to the class one or two companies that had the greatest influence on the team's portfolio.

4. Team members should discuss the following

20 pts

- Products or services of the companies
- Financial data
- Current events
- Major industry competitors
- Any difficulties their company faced recently that had a positive or negative impact on the stock's value.

5. Discuss the performance of your investment portfolio and the transactions your group made during the game.

20 pts

- Using charts, explain the movement and major events in your portfolio's performance during the SMG game.
- Discuss any news articles or world events that played a role in the stocks price movement.

6. Conclusion

10 pts

- Discuss the outcome of the investment strategy the team chose to use for the game
- Tell what you would you change about out your investment strategy?
- Evaluate the success of the team's investment strategy? Give it a grade of A to F.
- Did your stocks perform as expected? Explain why or why not.

SUBTOTAL 100 pts
Project Total 200 pts