

# Investment Portfolio

You are going to be participating in our How The Market Works (HTMW) Simulation. You may work alone or with a partner. The simulation begins Feb 11, 2014 and will continue until May 2, 2014. Prizes will be given to the individual or group with the greatest gain from all classes. Also, prizes will be awarded to the individuals or groups with the top three gains in each class.

**Each student** will compile a portfolio that includes the following items:

- 1) Cover Sheet – should include name, etc. and a graphic. Must be typed.
- 2) Table of Contents
- 3) Rules/Log-in/Investment Portfolio pages
- 4) Stock exchanges & Stock Search – Parent company sheet
- 5) Investment Research – make sure this is complete
- 6) Stock Recommendations
- 7) State of the Economy
- 8) Mutual Funds & Bonds
- 9) **Account Holdings** – You must make at least 20 trades during the course of the game. Print out the history of your transactions.
- 10) **Company graphs from [www.yahoo.com](http://www.yahoo.com) - finance page.** These graphs should be for the three months of our simulation. Print out a graph of each stock you have held for any period of time in the game. If you bought and sold it within the three months of the game, print the graph for three months and indicate when you bought it and when you sold. Since you must have made at least 20 trades during the course of the game, you should have at least 10 graphs allowing for the possibility that you purchased the same stock more than once.
- 11) **1 Graph from HTMW** – Print the graph of your portfolio's progress during the game.
- 12) **Reflection of learning** (2 pages typed, double-spaced, minimum 500 words). On the top of the page, indicate your ranking in the group and the dollar value of your holdings. This is a reflection of what you have learned through these activities listed above. Include one paragraph indicating what grade you should receive on this project and an explanation supporting your assessment.

**Completion** – to receive credit each sheet must be complete. No partial credit will be given.

Missing a sheet?

- Print it from the website & complete it
- **IF** the sheet is not uploaded to the website, you may photocopy a friend's sheet and write correct answers in your own handwriting

Projects are due **May 9, 2014. There will be no portfolios accepted late.** They need to be in a three-prong binder and arranged in the order indicated on the assessment sheet