

# How Successful Was My Investment Strategy?

## Suggested Grade

Grades 4-5

## Suggested Time

One or two class periods

## Teacher Background

In addition to teaching students about investing and the capital markets, The Stock Market Game™ is an opportunity for students to practice essential life skills like collaboration and debate. The activities in this lesson provide students with an opportunity to provide constructive criticism to their peers and reflect on their own performance as a part of a team

## 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

## Materials

Rubric 1: Report

Rubric 2: Presentation

Rubric 3: Self-Assessment

## Springboard

Ask your students:

1. How many of you or your parents have a photo album or scrap book?
2. Why do we save pictures, mementoes?
3. How is our SMG team folder like a scrap book? Why?



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Explain that the SMG team portfolio can remind us of what we learned, the decisions we made and how we were thinking over time.

## Procedure

Ask your students:

- How did you do?
- What did you like most about The Stock Market Game™?
- Did you like working in a team?
- Do you think you would have done better working by yourself?

Have each SMG team review their portfolios for the most successful stock and the least successful.

Ask your students: Would they do things differently next time?

Explain that each student will complete a report valuing how well their SMG team performed.

Distribute *Rubric 1* and instruct students to compose their reports following the rubric.

Explain that each SMG team will prepare a 5 minute presentation focusing on a stock that represents the team's performance.

Distribute *Rubric 2*. Teams should address the following in their portfolio description:

- Did they have rules they used to decide on what companies they would invest in?
- What companies did they invest in? Why?
- Did they have a stock that performed better than expected? Worse?

## Assessment

Distribute *Rubric 3*. Ask your students to rate themselves as a team member. They do not need to write anything down but should give serious thought to how well they felt they performed.

Have the students write a page that addresses this writing prompt:

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 be successful in the competition. Include tips on

- how to best prepare themselves for The Stock Market Game™
- the best way to get started as a team
- the most effective way conduct research
- the best way to come to an agreement as a team



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## Application

**InvestWrite**, adds a critical thinking component to help reinforce concepts learned in the classroom. Log on to [www.InvestWrite.org](http://www.InvestWrite.org) to download this semester's questions. Students will submit essays to you first; you can then select the three top essays to be included in the national competition.



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## Rubric 2: Presentation

Group: \_\_\_\_\_

Section	Criteria	Comments	Points
<b>Visual Aids</b>  <b>10 Pts</b>	Posters or PowerPoint  Showed creativity  Must have a graph		
<b>Presentation</b>  <b>10 Pts</b>	Neat and organized  Good use of visual aids  Well rehearsed and prepared		
<b>Time Limit</b>  <b>5 Pts</b>	5 minute minimum 15 minute maximum  TIME START _____  TIME ENDED _____		



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<p><b>Company Profile</b></p> <p><b>20 Pts</b></p>	<p>Talked about products or services</p> <p>Presented financial data</p> <p>Current events</p> <p>Major competitors</p> <p>Challenges they face</p> <p>Appeared researched</p>		
<p><b>Discuss Portfolio</b></p> <p><b>20 Pts</b></p>	<p>Used charts</p> <p>Explained the movement of portfolio holdings</p> <p>Explained transactions made and rationale</p>		
<p><b>Conclusion</b></p> <p><b>10 Pts</b></p>	<p>Described project outcome</p> <p>Named things the group would have done differently</p>		



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# Rubric 1: Report

Group # \_\_\_\_\_

Section	Criteria	Comments	Points
<b>Cover Page</b>  <b>5 Pts</b>	Team Name  Names of Members  Name of Company Researched  Date		
<b>Rationale</b>  <b>20 Pts</b>	What influenced their decisions? What were some major events that influenced their portfolio? How did you feel about their stocks price performance? Give a general description of team's holdings during the SMG game.		
<b>Stock Activity Sheet</b>  <b>20 Pts</b>	Daily closings recorded and filed in portfolio  Should fill in and graph the DJIA and their own portfolio		



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<p><b>Graph</b> <b>30 Pts</b></p>	<p>1 for portfolio and 1 for DJIA (optional)</p>		
<p><b>Copy of Weekly Portfolio</b> <b>10 Pts</b></p>	<p>Should have 1 of each - Account Summary - Account Holdings for the number of weeks the team was invested in the SMG game (ie: 7 weeks invested should have 6 of each)</p>		
<p><b>Conclusion</b> <b>15 Pts</b></p>	<p>One from each member of the group  What are your reactions and what did you learn?</p>		



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# Self Assessment: Team Participation Rubric

	1	2	3	4
<b>Research and Collect Information</b>	Did not collect any info relevant to topic.	Collected little information – most is relevant.	Collected some basic information – most is relevant..	Collected a lot of information – all relevant to the topic
<b>Responsibility</b>	Missed many deadlines and didn't complete some assignments given by the team.	Missed some deadlines but completed most of the assignments given by the team.	Consistently stays focused. Met most deadlines and completed all assignments given by the team.	Always focused. Met all deadlines and completed all team assignments well.
<b>Information Sharing</b>	Did not relay any relevant information to group.	Shared some relevant information.	Shared some relevant information with the team in a timely manner.	Shared a lot of relevant information for different sources with the team in a timely manner.
<b>Cooperation</b>	Didn't listen to others or value their opinions most of the time.	Listened to others and valued their opinions sometimes and participated in team debates.	Listened to others and valued their opinions. Provided constructive criticism during team debates.	Always listens to others and values opinions of others Never criticizes
<b>Overall effort and quality</b>	Work is not best quality Only applied a little effort.	Some work is quality. Applied some effort.	Most work is quality Showed effort.	All work is top quality. Put in a lot of effort.



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