

How Successful Was My Investment Strategy?

Suggested Grade

Grades 6-8

Suggested Time

One or two class periods for presentation preparation

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

Fact Sheet 1: Presentation and Portfolio Requirements

Activity sheet 1: Partner Evaluation Sheet

Rubric 1: Portfolio Rubric (for teacher use)

Rubric 2: Presentation Rubric (for teacher use)

Rubric 3: Peer Review Rubric (for students)

Grade Sheet: Individual Scores from Stock Market Project

Springboard

Discuss the following:

1. How has the experience of playing The Stock Market Game changed the way you think about investing?



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2. 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

Distribute *Fact Sheet 1: Presentation and Portfolio Requirements*. Each team will answer the following questions through a five to 15-minute presentation:

1. Where you have had your greatest success/your least success?
2. If you were starting over what part of your strategy would you change?

As each team presents, the other teams are using *Rubric 3: Peer Rubric* to provide constructive feedback.

After the presentations, each team member should complete *Activity Sheet 1: Partner Evaluation Sheet*.

Note: See attached *Rubrics 1 & 2* for grading rubrics

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

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.org to view this semester's questions. Students will submit their essays to you; you select the three top essays to enter in the national competition.



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Activity Sheet 1: Partner Evaluation Sheet

Please rank yourself and your partners on the following criteria.

In order for this tool to be valuable to all, you need to be honest so that each member gets the grade he or she deserves for the efforts put into the project.

Question	Brief Explanation for your rating
<p>On a scale of 1 - 10 (10 being the best), how much effort did YOU make to help the group with The Stock Market Game?</p> <p>Score: _____</p>	<hr/> <hr/> <hr/>
<p>On a scale of 1 - 10 (10 being the best), how much effort did <i><name of person evaluated></i> _____ make to help the group with The Stock Market Game?</p> <p>Score = _____</p>	<hr/> <hr/> <hr/>
<p>On a scale of 1 - 10 (10 being the best), how much effort did _____ make to help the group with The Stock Market Game project.</p> <p>Score = _____</p>	<hr/> <hr/> <hr/>
<p>On a scale of 1 - 10 (10 being the best), how much effort did _____ make to help the group with The Stock Market Game project.</p> <p>Score = _____</p>	<hr/> <hr/> <hr/>
<p>On a scale of 1 - 10 (10 being the best), how much effort did _____ make to help the group with The Stock Market Game project.</p> <p>Score = _____</p>	<hr/> <hr/> <hr/>



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Rubric 1: Report

Group # _____

Section	Criteria	Comments	Points
Cover Page 5 Pts	Team Name Names of Members Name of Company Researched Date		
Rationale 20 Pts	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.		
Stock Activity Sheet 20 Pts	Daily closings recorded and filed in portfolio Should fill in and graph the DJIA and their own portfolio		



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<p>Graph 30 Pts</p>	<p>1 for portfolio and 1 for DJIA (optional)</p>		
<p>Copy of Weekly Portfolio 10 Pts</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>Conclusion 15 Pts</p>	<p>One from each member of the group What are your reactions and what did you learn?</p>		



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Rubric 2: Presentation

Group: _____

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



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<p>Company Profile</p> <p>20 Pts</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>Discuss Portfolio</p> <p>20 Pts</p>	<p>Used charts</p> <p>Explained the movement of portfolio holdings</p> <p>Explained transactions made and rationale</p>		
<p>Conclusion</p> <p>10 Pts</p>	<p>Described project outcome</p> <p>Named things the group would have done differently</p>		



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Self Assessment: Team Participation Rubric

	1	2	3	4
Research and Collect Information	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
Responsibility	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.
Information Sharing	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.
Cooperation	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
Overall effort and quality	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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