

How Successful Was My Investment Strategy?

Suggested Grade

Grades 9-12

Suggested Time

One or two class periods for presentation preparation

Teacher Background

Having students work together to build and manage a hypothetical investment portfolio, applying the academic content and skills they are taught in their various subject classes, is a project-based learning activity. Asking students to work together to evaluate and explain their investment strategy and the strategy of their peers is an effective way to have them self-assess and you to assess their performance.

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



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Springboard

Discuss the following:

- 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

Distribute *Fact Sheet 1: Presentation and Portfolio Requirements*. Each team will make a five to 15-minute presentation on their investment strategy:

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

While SMG teams are presenting, their peers give the presenting team feedback using *Rubric 3: Peer Rubric*. Each team member should complete *Activity Sheet 1: Partner Evaluation Sheet*.

Note: See Rubrics 1 & 2

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, the innovative national writing competition is another way to assess students' learning. InvestWrite asks students to suggest solutions to financial market questions. In doing so, students synthesize their learning and apply it to a real -world issue. There are two Investwrite competitions each semester: <https://www.investwrite.org/>



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Activity Sheet 1: Partner Evaluation Sheet

Please rank yourself and your partners on the following criteria. **This form will be returned directly to the teacher:** no one else will be able to read it. In order for this tool to be valuable to everyone, you must be honest so that each member gets the grade he or she deserves for the efforts put into the project. **Participation will be worth 50 points of each person's grade.**

Give a brief explanation for your best efforts in helping your team with the Stock Market Game.

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? Score = _____

Give a brief explanation of (name of person evaluated)
_____ best efforts in helping your team with the Stock Market Game

On a scale of 1 - 10 (10 being the best), how much effort did he/she make to help the group with The Stock Market Game? Score = _____

Give a brief explanation of (name of person evaluated)
_____ best efforts in helping your team with the Stock Market Game

On a scale of 1 - 10 (10 being the best), how much effort did he/she make to help the group with The Stock Market Game? Score = _____

Give a brief explanation of (name of person evaluated)
_____ best efforts in helping your team with the Stock Market Game

On a scale of 1 - 10 (10 being the best), how much effort did he/she make to help the group with The Stock Market Game? Score = _____



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Give a brief explanation of (name of person evaluated)

_____ best efforts in helping your team with the
Stock Market Game

On a scale of 1 - 10 (10 being the best), how much effort did he/she make to help the
group with The Stock Market Game? Score = _____



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Fact Sheet: Presentation and Portfolio Requirements

Part 1 - 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. Rational** **20 pts**
 - What investment strategy did your team decide to follow? Why?
 - What influenced your transactions?
 - What were some major businesses 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**



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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



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Grade Sheet: Individual Scores from Stock Market Project

Individual Scores from Stock Market Project	
Student's Name	
Portfolio Points/Rubric 100 Total	
Presentation Points/Rubric 75 Total	
Peer Review Rubric 75 Total	
Participation Points 50 Total	
Total Points	



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Rubric 1: Portfolio Rubric

Teacher Portfolio Rubric 1 - Group # ____			
Section	Criteria	Comments	Points Rec'd
Cover Page 5 pts	<ul style="list-style-type: none"> • Team Name: • Names of Members • Name of Company Researched • Date 		
Rationale 20 pts	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Daily closings recorded and filed in portfolio • Should fill in and graph the DJIA and their own portfolio 		
Graph 30 pts	<ul style="list-style-type: none"> • 1 for portfolio and 1 for DJIA (optional) 		
Copy of weekly portfolio 10 pts	<ul style="list-style-type: none"> • 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) 		
Conclusion 15 pts	<ul style="list-style-type: none"> • One from each member of the group • What are your reactions and what did you learn? 		
		TOTAL POINTS (100 possible)	

Rubric 2: Presentation Rubric

Teacher Presentation Rubric 2 - Group # ____			
Section	Criteria	Comments	Points Rec'd
Visual Aids 10 pts	<ul style="list-style-type: none"> • Posters or PowerPoint • Showed creativity • Used graph/chart 		
Presentation 10 pts	<ul style="list-style-type: none"> • Neat and organized • Good use of visual aids • Well rehearsed and prepared 		
Time Limit 5 pts	<ul style="list-style-type: none"> • 5 minute minimum • 15 minute maximum • TIME START _____ • TIME ENDED _____ 		
Company Profile 20 pts	<ul style="list-style-type: none"> • Addressed products or services • Presented financial data • Covered current events • Identified major competitors • Listed challenges faced • Research evident 		
Discuss Portfolio 20 pts	<ul style="list-style-type: none"> • Used visual aids to clarify • Explained the movement of portfolio holdings • Explained transactions made and rationale 		
Conclusion 10 pts	<ul style="list-style-type: none"> • Described project outcome • Named things the group would have done differently 		
		TOTAL (75 points possible)	



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Rubric 3: Peer Review Rubric

Peer Presentation Rubric 3 - Group # ____			
Section	Criteria	Comments	Points Rec'd
Visual Aids 10 pts	<ul style="list-style-type: none"> • Showed creativity, interesting to look at • Used graph/chart, posters and/or PowerPoint 		
Presentation 10 pts	<ul style="list-style-type: none"> • Neat and organized • Good use of visual aids • Well rehearsed and prepared 		
Time Limit 5 pts	<ul style="list-style-type: none"> • 5 minute minimum • 15 minute maximum • TIME START _____ • TIME ENDED _____ 		
Company Profile 20 pts	<ul style="list-style-type: none"> • Product or service company provides • Financial Data complete • Current events, major competitors, and/or challenges to company • Team clearly did plenty of research 		
Discuss Portfolio 20 pts	<ul style="list-style-type: none"> • Used visual aids to clarify • Explained the movement of portfolio holdings • Explained transactions made and rationale 		
Conclusion 10 pts	<ul style="list-style-type: none"> • Described project outcome • Named things the group would have done differently 		
		TOTAL: (75 points possible)	



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