

# Title Page

Name

# Directions

1. Create a Smartstocks portfolio and maintain that portfolio between 05/11 and 06/05
2. Use your own name as the username, I will delete your account otherwise.
3. You have 1,000,000 to invest. As your portfolio increases, so will your available investment account.
4. You must invest within US markets only
5. You must have at least 8 different stocks by 05/22
6. Trading ends 06/05, at which date a winner will be determined based off of greatest overall value of portfolio
7. You may invest in “short sell” or “penny stocks”, but you must have a valued portfolio on 06/05
8. Please remember that usually money invested in the stock market is placed there for gains over the long term. Get rich quick might serve you well in the game, but it is very risky over the long term.
9. Complete the following portfolio project slides and present your report to the class.

# Understanding Question 1:

## Investment Objectives

- Discuss your original investment objectives and strategies to achieve those goals.
- Ensure that you explain how risk vs. return shaped your investment strategies over time

# Final Portfolio Holdings

Stock Name	Share Price	Shares Owned	Total Value
Grand Total Value of			

# Understanding Question 2:

## Focus Company

- Background information into a focus company of your choosing
- Consider the impact that being “publicly” owned has had on the company’s business model
- Summarize historical price trends over time

# Analysis Question 1:

- 1) What were the stocks you originally invested in? What were some of the key reasons you chose them? Describe the performance of each of these stocks over the project length. Did they perform as expected, or surprise you in some way?

## **Analysis Question 2:**

What, if any, trades did you make? How did those trades work out for you? If you didn't trade, why not? (If you made a multitude of trades, choose 5-6 to discuss that give you the best chance to demonstrate what you learned)

## **Analysis Question 3:**

Please explain 5 different microeconomic factors that affected the performance of your stocks over the course of this project:



## **Analysis Question 4:**

Please explain 5 different macroeconomic factors that affected the performance of the overall markets over the course of this project:

# Reflection Question 1:

Did you beat the indexes of this year's class average (meaning how did you do compared to your peers and the market)? What would you attribute this to? Would you follow the same strategy for your personal long term investment as you did during the game?

## Reflection Question 2:

Part A: Make a bulleted list of at least 8 specific things you learned about investing in the stock market.

Part B: At the end of the project, did you attain your original investment objectives? Why/Why not?