

T H I R D T R I M E S T E R T I M E F R A M E

Feb. 25 – Mar. 5	<p>Students research stocks and <i>decide</i> which stocks to buy by March 5 deadline. (minimum = 10; maximum =25)</p> <p>Investopedia Says... <i>Studies and mathematical models have shown that maintaining a well-diversified portfolio of 25 to 30 stocks will yield the most cost-effective level of risk reduction. Investing in more securities will still yield further diversification benefits, albeit at a drastically smaller rate.</i></p> <p>Students document investigative process on <i>Student Research Log</i>. (Refer to <i>Works Cited</i> handouts for required source information.) (Students submit <i>Student Research Log</i> to teacher April 14.)</p>
March 1 - 5	<p>Students complete risk assessment. Choose one site only from this list. Students' Deadline to print and submit risk assessment results to teacher is any date between March 1 and 5.</p> <p>http://www.rcrc.rutgers.edu/money/riskquiz/ http://partners.financenter.com/bankone/learn/guides/allocation/aarisk.fcs http://pages.stern.nyu.edu/~adamodar/New_Home_Page/invmgmt/ch2/risktol.htm http://moneycentral.msn.com/investor/calcs/n_riskq/main.asp http://www.kiplinger.com/personalfinance/tools/riskfind.html http://www.calcxml.com/do/inv08</p>
March 1 - 5	<p>Students set an investment goal (or goals). An investment goal example may be to achieve a certain percentage increase over the initial \$500,000 investment <i>or</i> to match an index's rate of growth <i>or</i> to understand <i>or</i> to learn a specific concept or rule, etc.</p> <p>Students' Deadline to submit investment goal/s on <i>Investment Goal</i> form to teacher is any date between March 1 and 5.</p>
March 1 - 5 t-shirt form due	<p>Students <u>create</u> portfolio. Complete \$500,000 cash transaction and securities transactions (one for each purchase).</p> <p>Students' Deadline—Printout 1: Students print and submit to teacher portfolio from either Yahoo or SmartMoney including date—must be dated between March 1 and 5. <i>Day's Range</i> column MUST be displayed on Yahoo printout; refer to <i>Day's Range</i> handout. Print in Landscape Orientation. (Do not download spreadsheet.) Student handwrites name near date. Tracking may begin effective March 1 if students complete portfolios prior to March 5.</p>
March 5	<p>Students' Deadline to create portfolio; complete \$500,000 cash transaction and securities transactions (one for each purchase).</p>
Mar. 8 – April 9	<p>TRACK PORTFOLIO. Students document tracking on <i>Student Tracking Log</i>. Check daily or as often as possible; students are required to check twice weekly. Students may buy and sell as desired; document dates and reasons; a <i>Sell or Purchase Stocks</i> documentation tool is provided. (Students submit <i>Student Tracking Log</i> to teacher April 14.)</p>
April 5 - 9	<p>END TRACKING</p> <p>Students' Deadline—Printout 2: Students print and submit to teacher portfolio from either Yahoo <u>or</u> SmartMoney including date—must be dated between April 5 and 9. Print in Landscape Orientation. (Do not download spreadsheet.) Student handwrites name near date.</p>
April 14	<p>Students' Deadline to submit final report to teacher. (Refer to <i>Report Requirements</i> handout.)</p> <p>Students' Deadline to submit <i>Student Research Log</i> to teacher. (Information was needed for report.)</p> <p>Students' Deadline to submit <i>Student Tracking Log</i> to teacher.</p>
Apr. 15-20	<p>Teachers screen final reports.</p>
April 21	<p>Teachers' Deadline to FAX/EMAIL top 1 or 2 reports (p e r c l a s s) to Invest Ed[®] staff. MUST BE FAXED/EMAILED NO LATER THAN April 21.</p>
May 8	<p>Awards Ceremony – Saturday luncheon on OU campus</p>