

REPORT REQUIREMENTS



Due Date Refer to Project Timeframe.

Report Layout

Assemble in this order.

- 1) Cover Page Refer to attached handout.
- 2) Body Maximum length is 10 pages *including* Cover, Works Cited, and two printouts. There is no minimum length requirement.
sources required—minimum of 5
- 3) Works Cited (separate page) Refer to 7-page handout guidelines.
- 4) 2 printouts Portfolio from either Yahoo Finance or SmartMoney
Printout 1 (Refer to Project Timeframe for due date.)
Printout 2 (Refer to Project Timeframe for due date.)
Yahoo Printouts must display *Day's Range* column. Refer to attached instructions. Handwrite name on printouts near printed date.

Report Format

- | | |
|--------------|---|
| margins | 1" left and right and 1" top and bottom |
| body | double space |
| font | Arial or Times New Roman |
| font color | black, on white paper only |
| font size | 12 |
| page numbers | bottom, center |

No report folders –
Teachers will mail
reports US Postal
Service mail.

Report Body (Encourage students to write an introduction!)

Reports must discuss **RISK, GOALS, FRAUD**, and **DIVERSIFICATION** to qualify as winning reports.

- Discuss your research process.
- What criteria did you use to determine which stocks to buy? Did you use a Stock Screener? If so, which site's screener did you use? Was it helpful? Why or why not?
- Give detailed information on at least one of the stocks you purchased. Include history, company and industry trends, and other relevant factors.
- Did you sell any stock during the project? If so, discuss why along with the results of the sale/s. Did you purchase additional stock after your initial investment? Why? Results?
- Discuss risk. Mention the risk assessment tool (site) used. How well did your risk assessment results match your Portfolio results?
- Discuss your investment goal (or goals). Did you achieve your goal/s? Discuss.
- What did you learn about recognizing investment fraud and protecting yourself against it?
- Discuss diversification. Why diversify? How did you diversify? Talk about its impact on your portfolio results.
- Talk about *specifics* you learned as a result of this project.
- Has your opinion on monitoring your finances changed as a result of this project? How?
- What is your perspective of the market as a result of this project?
- What value did this project provide you in your present? Future?
- Is there an investment goal in your future? Discuss.

Words to **avoid** are trade, trader, etc. and game or play.

REPORT EVALUATION

- 45%** thoroughness of information provided; logical and critical thinking displayed; use of sources; quality of presentation
- 30%** How well do your Portfolio results match risk assessment results and investment goal/s? Compare Portfolio *Value* and *Gain* columns from beginning to end. (2 required printouts—Yahoo printouts must include *Day's Range* column and date.)
- 25%** English usage and grammar; follow report requirements