

1 S T T R I M E S T E R T I M E F R A M E

Sept. 7 – Sept. 17	<p>Students research stocks and <i>decide</i> which stocks to buy by September 17 deadline. (minimum = 10; maximum =25) 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> 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 November 2.)</p>
Sept. 13 – Sept. 17	<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 September 13 and 17. http://www.rcrc.rutgers.edu/money/riskquiz/ 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>
Sept. 13 – Sept. 17	<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. Students' Deadline to submit investment goal/s on <i>Investment Goal</i> form to teacher is any date between September 13 and 17.</p>
Sept. 20 – Sept. 24	<p>Students <u>create</u> portfolio. Complete \$500,000 cash transaction and securities transactions (one for each purchase). Students' Deadline—Printout 1: Students print and submit to teacher portfolio from Yahoo <u>or</u> SmartMoney including date—must be dated between Sept. 20 and 24. <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 September 20 if students complete portfolios prior to September 24.</p>
t-shirt form due	
Sept. 24	<p>Students' Deadline to create portfolio; complete \$500,000 cash transaction and securities transactions (one for each purchase).</p>
Sept. 27 – Oct. 22	<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 November 2.)</p>
Oct. 18 – Oct. 22	<p>END TRACKING Students' Deadline—Printout 2: Students print and submit to teacher portfolio from Yahoo <u>or</u> SmartMoney including date—must be dated between October 18 and 22. Print in Landscape Orientation. (Do not download spreadsheet.) Student handwrites name near date.</p>
Nov. 2	<p>Students' Deadline to submit final report to teacher. (Refer to <i>Report Requirements</i> handout.) Students' Deadline to submit <i>Student Research Log</i> to teacher. (Information was needed for report.) Students' Deadline to submit <i>Student Tracking Log</i> to teacher.</p>
Nov. 3 - 7	Teachers screen final reports.
Nov. 8	Teachers' Deadline to mail top 1 or 2 reports (per class) to Invest Ed [®] staff. No folders please. MUST BE POSTMARKED NO LATER THAN November 8.
Dec. 4	Awards Ceremony – Saturday luncheon on OU campus