Stock Market Challenge: Course Culminating Activity – 30%

**Assignment:** Individually you will manage a Wealth Portfolio through Marketwach using [marketwatch.com/games](https://www.marketwatch.com/games). You will have 250,000$ per person to invest. You will conduct research on companies you plan on investing in, present that research in a portfolio style document, make trades to try and turn a profit and then reflect on your learning.

**Research Portfolio**

**Step 1:** Investment Selection. You must choose 6 investments at minimum.

* 1 Commodity
* 1 ETF
* 1 Bond
* Any other 3

**Note:** After your initial investments, you may make whatever trades you choose.

**Step 2:** Research. Research at least your chosen 6 investments. You need to find out its trading history, trends, valuation, company or stock history and present reasons why you think you should invest in it.

**Step 3:** Stock Portfolio. Using *Canva*, create a Stock Market Portfolio. Your portfolio must have:

* *Organization* – Table of Contents, Page Numbers, Names on Pages *You* Created
* *Economic Information* – Explanation of Terms: For Example, Shorts, Longs, Bull, Bear, Order
* *A Works Cited Page* (last page of your portfolio), MLA In-Text Citations
* Information on your chosen 6 investments: Background and History, Rationale as to why you choose that company
* *Investment Strategy –* Why you divided up your money the way you did
* *Visuals* – Graphs, Charts, Colour
* *Initial Investments* – How much you invested and where you invested it

**Evaluation #1 (May 27th) - Portfolio Conferences: 5%**

Once your portfolio is created, you will have a conference where I will look at what you have created, and you will each explain in detail your chosen investments. This is of course a live document and will change. I will be evaluating your explanation of it not the document itself.

***Assessment Checklist:***

1. *Use economic concepts to explain stock choices and any trades already made.*
2. *Explain backgrounds of companies chosen.*
3. *Explain goals of investment growth and rationale behind it.*
4. *Provide any other necessary details about current investments OR future investments.*

**Step 4:** Trades. (**Finish June 9th**) This will likely begin while you are creating your portfolio. You will begin trading stocks. You will have **2 Months** to trade stocks and you MUST record transactions. IF you trade a lot, record important transactions. You **MUST** show trades and rationalizations for them in the end.

**Step 5:** Polish Portfolio. Add whatever extra elements you feel is necessary to your portfolio. These could include, stock trading history, information about other stocks you chose, visuals like graphs and charts from your simulation and **each of your reflections.**

**Evaluation #2 - (June 13th) Final Portfolio: 15%**

You will polish your portfolio (see below) and hand it in as a printed and banded document in colour.

Assessment Checklist:

1. *6 + Stock/Bond/ETF Information*
2. *Graphs and Charts*
3. *Corporation/Stock/Bond/ETF Background*
4. *Trade History and Rationale (Important trades – need at least 3 – 4)*
5. *A reflection on your stock market trading experience.*

Potential Reflection Questions:

1. What were the economic concepts you applied and how did you apply them during the simulation?
2. Why you made trades you did?
3. What did you learn from the simulation?
4. What would you do if it was real money you were using; would it feel different?

Evaluation: You will be evaluated according to the rubrics below.

**Portfolio Conference Rubric – 5%**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Criteria | Level 1 (50 – 59%) | Level 2 (60 – 69%) | Level 3 (70 – 79%) | Level 4 (80 – 100%) |
| Knowledge  Do you demonstrate knowledge of economic concepts learned in the course? | You explain a few economic concepts you learned in the course. | You explain some economic concepts you learned in the course and how they relate to your investment strategy. | You explain considerable economic concepts you learned in the course and how they relate to your investment strategy. | You explain a variety of economic concepts and in detail how they relate to your overall investment strategy. |
| Thinking  Do you conduct research on your investments? | You have limited research. (4 secondary sources.) | You have some research. (5 secondary sources) | You have considerable research (6 secondary sources) | You have done thorough research (more than 6 secondary sources) |
| Communication  Do you clearly communicate your information in your Portfolio?  (*Oral Communication/ Explanation*) | You demonstrate limited ability to communicate your rationale. | You somewhat clearly communicate your rationale. | You clearly communicate your rationale for your portfolio choices to this point. | You demonstrate an excellent ability to clearly communicate your portfolio choices and respond well to questions. |
| Application  Do you apply concepts you learned when choosing and researching your investments? | You apply few concepts to your stock market trading strategy. | You apply some concepts to your stock market trading strategy. | You apply a considerable amount of well – chosen concepts learned in class to your trading strategy. | You apply a variety of economic concepts learned in and out of class to your trading strategy. |

**Reflection Rubric – 10%**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Criteria | Level 1 (50 – 59%) | Level 2 (60 – 69%) | Level 3 (70 – 79%) | Level 4 (80 – 100%) |
| Knowledge  Do you demonstrate knowledge of economic concepts you used in your simulation to make decisions? | You demonstrate limited knowledge of economic concepts. | You demonstrate some knowledge of economic concepts you used in your simulation. | You demonstrate considerable knowledge of economic concepts you used in your simulation. | You demonstrate knowledge of a wide – variety of economic concepts you used in your simulation. |
| Thinking  Do you analyze the rationale behind the trades you made? | You have few details of trades you made. | You have details of some trades and why you made them. | You have details of significant trades and why you made them. | You have details of a variety of significant trades you made and the reasons behind them. |
| Communication  Do you clearly communicate your learning from the simulation? | You demonstrate limited learning from the simulation. | You demonstrate some learning from the simulation. | You communicate a considerable amount of learning throughout the simulation. | You clearly communicate your learning throughout the assignment. |
| Application  Do you reflect on you and your team’s performance and any changes you would make? | You demonstrate a limited ability to reflect on your performance in the simulation. | You have some critical reflection on you and your team’s performance. | You reflect on you and your team’s performance in the simulation and point out areas of success and ways to improve. | You have a critical reflection that analyzes you and your team’s performance by applying economic concepts learned in class. |

**Investment Portfolio – 15%**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Criteria | Level 1 (50 – 59%) | Level 2 (60 – 69%) | Level 3 (70 – 79%) | Level 4 (80 – 100%) |
| Knowledge  Do you demonstrate knowledge of investments you invested in?  Do you demonstrate knowledge of economic concepts learned? | You demonstrate limited knowledge of your investments.  You demonstrate a limited understanding of few economic concepts. | You have some information about your investments (mostly background and history)  You demonstrate some understanding of few economic concepts that you use in your portfolio. | You have considerable information about your investments (background, history, recent performance)  You demonstrate a considerable understanding of a variety of economic concepts that you use in the portfolio. | You have thorough information about your investments (background, history, recent performance and future forecasts)  You demonstrate a thorough understanding of a wide – variety of economic concepts that you use in the portfolio. |
| Thinking  Do you conduct research on your investments? | You have 1 secondary source that you use in your portfolio. | You have 2 secondary sources you use in your portfolio. | You have 3 secondary sources you use effectively in making decisions in your portfolio. | You have more than 3+ secondary sources you use effectively in making decisions in your portfolio. |
| Communication  Is your portfolio visually stunning?  Do you have grammar, spelling and paragraph structure errors? | Your portfolio needs improvement in terms of organization and visual appearance.  You have many grammar, spelling and/or paragraph structure errors. | Your portfolio is somewhat organized and somewhat visually appealing.  You have some grammar, spelling and/or paragraph structure errors. | Your portfolio is organized, has a Works Cited Page, and is visually appealing.  You have few grammar, spelling and/or paragraph structure errors. | Your portfolio is very well organized, has a Works Cited Page, and is visually stunning.  You have 0 grammar, spelling and/or paragraph structure errors. |
| Application  Do you apply concepts learned in class during your trading? | You apply few concepts learned in your trading. | You apply some concepts learned when making trades. | You apply considerable concepts learned when making trades. | You make trades using information and by applying appropriate economic concepts learned in class and on your own. |