

## FN 312 -Investment Challenge Write Up Guideline

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Along with your oral presentation, this write up determines the total score you will receive for the investment project.

The write up *must* follow these specifications.

**TITLE PAGE** 1 page of single-spaced text, including:

- Your name
- Group number
- Name of team members
- An executive summary, which outlines
  - Team's overall strategy or strategies as it evolves throughout the course
  - Total amount invested on February 28, March 28, and April 18.
  - Average number of assets in the portfolio during the investment challenge game
  - Final value, profit/loss, and number of assets remaining in your portfolio on May 2.

**BODY OF WRITE UP** (3 pages of single-spaced text, approximately a page for each section, *do not* include graphs/figures)

### Section I: Portfolio Performance

- An analysis of the team's overall portfolio performance throughout the semester (you can discuss any risk/return measures that you considered)
- An analysis of best/worst or what you deemed to be the most interesting performing assets.

### Section II: Rationale

- Describe how selected stocks/funds fit in with the team's strategy
- Describe how the team's strategy relates to concepts learnt in the course eg. bottom-up/top-down approaches, diversification strategies, CAPM.
- Describe the research that your team conducted prior to the selection of some stocks/assets

### Section III: Evaluation and Conclusion

- Describe whether the team's strategy was effective
- Describe your contribution to the team and explain what you may have done differently from the team's strategy, or what the team could have done differently in hindsight

- Proposed changes in strategy for future investments

**BIBLIOGRAPHY/APPENDIX (OPTIONAL)**

- Include here any additional citations, general background data, graphs/figures/technical analysis.