

FN 312 - Investment Challenge Write Up Guideline

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
 - 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 November 17.

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

PEER EVALUATION (1 page single-spaced text)

- Please give yourself and each of your team members a score of 1 to 5, with 1 being NOT PARTICIPATIVE in the investment challenge and 5 being VERY PARTICIPATIVE. 3 is NEUTRAL.
- Describe your contribution to the investment challenge and whether you feel that you were actively engaged in the group activities.
- Discuss any problems working with your team members (if any).
- If any team members were exceptional and actively engaged in group activities, feel free to mention them and describe their efforts in this section.

BIBLIOGRAPHY/APPENDIX (OPTIONAL)

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