

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
 - Total amount invested on February 24, March 31, and April 28.
 - 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 April 28.

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.