

B.E. International Program

Faculty of Economics, Thammasat University

FN221 Group project: Asset allocation plan

Instructions: You assign to provide a financial advice for the family of your team leader. You do not need to write any report but to prepare a 20-minute group presentation on April 27, 2013. The order of the presentation will be random. At least four speakers (two from each subgroup) are required to give a presentation but all members require to participate. Please feel free to add additional assumptions to the case as long as they are realistic for situation and described in your answer (30 pts.).

Your presentation will include

- 1 page of an individual's current situation (establish an individual's need, his/her financial status and cash flow, evaluate an individual's current saving choice)
- 1 page of individual's financial goals (time horizon, risk level, goal evaluation)
- 1 page of overall recommended asset allocation plan (proportion of each investment asset weight subject to the current and future economic condition)
- 2-3 pages of each investment asset details
- 1 page of the asset allocation plan performance evaluation

Table 1: Type of assessment

Type of evaluation	Measurement	Proportion
Self	Each group will evaluate one another since there are two subgroups within a whole group.	15%
Peers	Each group will evaluate others during the presentation.	15%
Instructor	The evaluation criteria is listed in table 2.	40%
Commentators		30%

Table 2: The list of evaluation criteria

Type of criteria	Proportion
Well-established case analysis	30%
Strategic asset allocation plan	30%
Well-presented case	20%
Flexibility of your proposed plan	10%
Good time management	10%