

Stock Market Mid-Term Presentation

Individual Assignment

- 1) Pick one stock from your group's initial investment plan and write about the following:

The sector it belongs to, the products they produce/sell, how the stock price changed over the last one month. Has your group purchased it? Explain.

- 2) Pick one mutual fund from your group's initial investment plan and write about the following: How NAV (Net Asset Value) changed over the last one month, its YTD performance, list the top ten holdings. Has your group purchased it? Explain.

(Make sure that you do not have the same stock/ Mutual Fund as other group members.)

- 3) Read a news article about your stock and report anything that might impact your decision to buy/sell the stock.
- 4) What did the one month graph for this stock look like? Was there a buying or selling opportunity that you missed? Explain.
- 5) List the stocks and mutual funds your team has purchased so far in account holdings and the sectors they belong to.
- 6) A diversified portfolio should have a wide variety of investments like stocks, mutual funds etc. in different sectors of the economy. Is this a diversified portfolio? Which investments/ sectors do you think your team needs to focus on?

(Put this assignment on a separate sheet of paper.)