

Researching Your Portfolio



Now that we've started the FSS MarketWatch Challenge, you probably realize that you are pretty much creating your own mutual fund. Your portfolio of investments represents a possible investment product that you could market to other people. I mean, you feel pretty confident in your decisions ... right?

You will conduct research on 5 of your investment choices, prepare rock-solid reasons for why you chose these investments, and put together a 7-slide PowerPoint presentation selling us on the idea of investing in YOUR mutual fund. Of course, you'll also need a catchy name for your portfolio.

POWERPOINT: The PowerPoint should include 7 slides:

- 1 intro slide listing the 5 stocks you selected. Maybe show company logos? Product pictures?
- 5 slides – one for each stock – highlighting what the company does, statistics on the stock performance, recent news stories, and WHY you think the stock will perform well this year. This is not just facts and figures (and should not be copy and pasted from Google or Yahoo) ... this should give REASONS.
- 1 conclusion slide – “you should invest in my mutual fund because...”

DO INCLUDE: transitions, animations, cool backgrounds, clip art, photos, text effects, sound effects (as long as they are professional).

DON'T INCLUDE: backgrounds that make it hard to read the text, colors that make it hard to read the text, fonts that make it hard to read the text (notice a pattern?), timing (this NEVER works well), music (not appropriate in a formal presentation).

Words and Concepts to Include:

- Diversification
- Risk, Return, Liquidity
- Stock Selection Strategies; Why These Stocks Will Perform Well In The Current Economy
- Ticker Symbol, Current Price, How It Has Performed In The Past Year
- Stock Valuation, P/E Ratio (is the stock a good buy?)
- Dividends (does the stock provide income by paying a dividend?)
- Capital Gains (is it a high growth stock that doesn't pay a dividend, but will provide capital gains?)