

## SEMESTER PROJECT TIMEFRAME

Jan. 19 – Feb. 2	<p>Students research stocks and <i>decide</i> which stocks to buy by February 2 <b>deadline</b>.  <b>(minimum = 10; maximum =25)</b>  <i>Investopedia Says...</i>  <i>Studies and mathematical models have shown that maintaining a well-diversified portfolio of 25 to 30 stocks will yield the most cost-effective level of risk reduction. Investing in more securities will still yield further diversification benefits, albeit at a drastically smaller rate.</i>          Students document investigative process on <i>Student Research Log</i>. (Refer to <i>Works Cited</i> handouts for required source information.) (Students submit <i>Student Research Log</i> to teacher April 6.)</p>
Jan. 27 – Feb. 2	<p>Students complete risk assessment. Choose one site only from this list. Students' <b>Deadline</b> to print and submit risk assessment results to teacher is any date between Jan. 27 and Feb. 2.  <a href="http://www.rcrc.rutgers.edu/money/riskquiz/">http://www.rcrc.rutgers.edu/money/riskquiz/</a>  <a href="http://pages.stern.nyu.edu/~adamodar/New_Home_Page/invmgmt/ch2/risktol.htm">http://pages.stern.nyu.edu/~adamodar/New_Home_Page/invmgmt/ch2/risktol.htm</a>  <a href="http://moneycentral.msn.com/investor/calcs/n_riskq/main.asp">http://moneycentral.msn.com/investor/calcs/n_riskq/main.asp</a>  <a href="http://www.kiplinger.com/personalfinance/tools/riskfind.html">http://www.kiplinger.com/personalfinance/tools/riskfind.html</a>  <a href="http://www.calcxml.com/do/inv08">http://www.calcxml.com/do/inv08</a></p>
Jan. 27 – Feb. 2	<p>Students set an investment goal (or goals). An investment goal example may be to achieve a certain percentage increase over the initial \$500,000 investment <i>or</i> to match an index's rate of growth <i>or</i> to understand <i>or</i> to learn a specific concept or rule, etc.          Students' <b>Deadline</b> to submit investment goal/s on <i>Investment Goal</i> form to teacher is any date between Jan. 27 and Feb. 2.</p>
Feb. 3 – Feb. 9	<p>Students <u>create</u> portfolio. Complete \$500,000 cash transaction and securities transactions (one for each purchase).          Students' <b>Deadline—Printout 1</b>: Students print and submit to teacher portfolio from Yahoo <u>or</u> SmartMoney including date—must be dated between Feb. 3-9. <i>Day's Range</i> column <b>MUST</b> be displayed on Yahoo printout; refer to <i>Day's Range</i> handout. Print in Landscape Orientation. (Do not download spreadsheet.) Student handwrites name near date. Tracking may begin effective February 3 if students complete portfolios prior to February 9.</p>
Feb. 9	<p>Students' <b>Deadline</b> to create portfolio; complete \$500,000 cash transaction and securities transactions (one for each purchase).</p>
Feb. 10 – March 26	<p><b>TRACK PORTFOLIO.</b> Students document tracking on <i>Student Tracking Log</i>. Check daily or as often as possible; students are <b>required</b> to check twice weekly. Students may buy and sell as desired; document dates and reasons; a <i>Sell or Purchase Stocks</i> documentation tool is provided. (Students submit <i>Student Tracking Log</i> to teacher April 6.)</p>
March 22 - 26	<p><b>END TRACKING</b>          Students' <b>Deadline—Printout 2</b>: Students print and submit to teacher portfolio from Yahoo <u>or</u> SmartMoney including date—must be dated between March 22-26. Print in Landscape Orientation. (Do not download spreadsheet.) Student handwrites name near date.</p>
April 6	<p>Students' <b>Deadline</b> to submit final report to teacher. (Refer to <i>Report Requirements</i> handout.)          Students' <b>Deadline</b> to submit <i>Student Research Log</i> to teacher. (Information was needed for report.)          Students' <b>Deadline</b> to submit <i>Student Tracking Log</i> to teacher.</p>
April 7 - 12	<p>Teachers screen final reports.</p>
April 13	<p>Teachers' <b>Deadline</b> to mail top 1 or 2 reports (per class) to Invest Ed<sup>®</sup> staff. No folders please.  <b>MUST BE POSTMARKED NO LATER THAN April 13.</b></p>
May 8	<p>Awards Ceremony – Saturday luncheon on OU campus</p>