

The Great Canadian Bears vs. Bulls Investment Challenge

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Introduction

You are being given \$100,000.00 to invest in the stock market. Your challenge is to research and choose five companies to invest in, then track them over a six-week period. Of course, you will not be investing real money but you still want to invest as wisely as possible.

The Task

Gather as much information as you can about five companies you would like to invest in. Try to diversify your stock holdings or portfolios by choosing some stocks from industries that are high risk and others that are more likely to guarantee a steady return on your investment.






While you are researching your companies, you should find out and record in your portfolio, 1) how many shares of each companies' stock you are going to buy, 2) the ticker symbol for the company, 3) the cost per share of the companies' stock, and 4) the net cost (amount of shares x amount each share costs).

Your end product will be a graph for each of the stocks you have selected. The graphs will include the weekly progress of the stock throughout the six-weeks in EXCEL. A portfolio page with a log of activity of each stock is also required prepared in WORD. Here you will include company information as well as at the end of the six-week period, selling your portfolio to determine your profit or loss. And finally, you need to prepare a five-slide PowerPoint presentation outlining the benefits of investing in your best performing stock, describing the stock's performance and any possible ways in which this investment would have been more profitable if the investment were made differently.



The Process

1. First you will explore the sites listed and choose five stocks that interest you. As you search, save images and collect information on the companies to help in your PowerPoint presentation.
2. Use the \$100,000.00 investment money and purchase stocks from your selected companies. The closing price listed on the day you purchase your stocks is the purchase price. This will be the basis of your portfolio page. 
3. Set up tables for your graphs in EXCEL for each company's stock and record on a weekly basis for a six-week period the closing price of each stock.
4. After the six-week period of monitoring, do a final sale of all of your stocks and determine if your portfolio of stocks has improved or decreased. 
5. Once you have completed the investment challenge, have your graphs and portfolio page finished; create a five-slide PowerPoint presentation on your best performing company. 

Evaluation

You will experience how the stock market can be profitable and the risks involved in investing in the stock market. While you are learning the pit falls of the stock market you will also become more comfortable with the use of the Internet as a tool for research and information.



Rubric for Graphs

This is the grading standard for the graphs.

	Beginning 10 points	Developing 15 points	Accomplished 20 points	Exemplary 25 points	Score
Overall Visual Appeal	Less than Adequate	Adequate	Neat, well done	Attractive, neat, well done	
Accuracy of Graph	Doesn't give correct data	Gives data, but not carefully placed	Gives accurate and correctly placed data	Accurately and attractively displays data	
Individual Items of Data Used	Doesn't follow directions	Is not completely correct, but somewhat	Follows instructions for graph	Uses correct data and graph is displayed well	
Timeliness	Turned in 3 days late	Turned in 2 days late	Turned in 1 day late	Turned in on time	

Rubric for Portfolio Page

This is the grading standard for the portfolio page.

	Beginning 10 points	Developing 15 points	Accomplished 20 points	Exemplary 25 points	Score
Overall Visual Appeal	Less than Adequate	Adequate	Neat, well done	Attractive, neat, well done	
Completeness	Incomplete	Almost all filled in	Complete, no total on last line	Completely correct and complete	
Data Used	Doesn't follow directions	Is not completely correct, but somewhat	Follows instructions for portfolio page	Uses correct data and portfolio is displayed well	
Timeliness	Turned in 3 days late	Turned in 2 days late	Turned in 1 day late	Turned in on time	

Portfolio Page for:

Name

Class



Company Name	Company Symbol	Date Purchased	Number of Shares Purchased	Purchase Price Per Share	<i>Shares</i>	<i>Multi-</i>	<i>by</i>	<i>Price</i>		
					Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
1.					\$					
2.					\$					
3.					\$					
4.					\$					
5.					\$					
			Total in	Portfolio	\$					

Rubric for PowerPoint Presentation

This is the grading standard for the PowerPoint presentation.

	Beginning 10 points	Developing 15 points	Accomplished 20 points	Exemplary 25 points	Score
Overall Organization	Presentation is disorganized	Information and graphics placed haphazardly	Presents findings and conclusions with some degree of organization	Presents findings and conclusions in an organized manner	
Persuasiveness	Not at all persuasive	Shows little evidence of persuasion	Shows some effort to persuade	Makes a dramatic and compelling argument	
Content Data Used	Only one slide and doesn't use any examples to backup argument	Uses two to three slides and less than two examples to backup argument	Uses four slides and two to three examples to backup argument	Uses five slides and more than three examples to backup argument	
Timeliness	Turned in 3 days late	Turned in 2 days late	Turned in 1 day late	Turned in on time	

Conclusion

When you have finished creating your stock portfolio, you will now be able to keep track of your stocks by the links from this page. And at the end of the six-week period, you will be able to determine how much you have earned or lost by finally selling your investment. Your Internet skills will also improve and you will become better investors in the stock market by being able to locate pertinent information about where to find investment information to improve your skills in the marketplace. Where do you think your stocks will be in a few months, a year, five years?



Teacher Resources

Objectives

1. Students will be able to recognize and use term related to the stock market.
2. Students will be able to use research tools on the Internet to make an informed decision in developing their stock portfolio.
3. Students will be able to track and manage their own portfolio of stocks.
4. Students will be able to analyze and compare the performance of different stocks.
5. Students will be able to create a spreadsheet table and graphs of stock prices.
6. Students will be able to organize and store information over a period of weeks in a portfolio page.
7. Students will be able to create a multimedia presentation.



Techniques

The investment challenge has been developed and designed for use in Economics classes at the 11th grade. Students will need to know how to navigate the Internet prior to beginning the challenge as well as being familiar with making a simple table and graph using EXCEL. Making PowerPoint slideshows should also be part of the students' prior skill set.

The teacher should act as the broker and have the students do their own individual research for the stocks they wish to buy. The many different kinds of stock listed can become a stumbling block, so it is simpler to stick to common stock.



This challenge gives the student a small taste of what the world of investing can be like. But initially, the class should discuss the stock market and research how it works, why to use it, how to invest and how to decide what to invest in.

Finally, have fun and be creative.