

BANKING AND INVESTING LONG-TERM PROJECT UPDATE

EACH PORTFOLIO WILL CONSIST OF THE FOLLOWING

1. A report cover - **issued**
2. An attractive cover sheet stating the student's name, name of project, name of class, and name of teacher, plus anything else the student thinks is appropriate. – **in progress**
3. An information sheet on the company, including its name, its business, the products/services the company handles, the exchange (ex. NYSE) the company is a part of, the name of the stock, bond, mutual fund, the purchase price when the investment option was bought and/or sold, the 52 week high and low of the investment option when it was purchase, and the 52 week high and low of the investment option at the end of the project (blank forms will be provided). – **started**
4. A stock, bond, mutual fund journal or transaction sheet/s – total purchase must tally up to \$50,000, or close thereby (blank sheets will be provided). - **completed**
5. Plotting/graph paper with information legend (ex. weeks horizontally and price vertically) and trend line showing the price changes over time (blank graph/plotting paper will be provided). - **started**
6. Articles from newspaper, magazine, internet, etc... used to research the companies invested in (must invest in more than one company). – **not started**
7. A one-page summary explaining what was learned from the project, any problems encountered, and an evaluation of how you did overall (profit/loss), and why you think you ended up with the result that you did. - **not started**

RUBRIC FOR BANKING AND FINANCE INVESTMENT PROJECT

	(100-80)	(79-70)	(69-50)	(49-0)
Report cover	Have report cover in excellent shape	Report cover in decent shape	Report cover in average shape	Do not have report cover
Cover sheet	Have cover sheet with all four of the information listed	Have three information listed	Have two information listed	Have one or no information listed
Company's information	Have all eleven information categories listed	Have eight of the categories listed	Have six of the categories listed	Have 4-5 or none of the categories listed
Transaction sheet	Have all transactions posted	Have 85% of transactions posted	Have 75% of transactions posted	Have 50% to no transaction posted
Writing legends and plotting trends	Almost all legends clearly noted and trends correctly plotted for <u>all</u> assigned investment options	Legends clearly noted and trends correctly plotted for 85% of investment options OR Legends not clearly noted and trend plots not accurate for <u>all</u> assigned investment options	Legends clearly noted and trends correctly plotted for 75% of investment options OR Legends not clearly noted and trend plots not accurate for 75% of investment options	Legends clearly noted and trends correctly plotted for 50% -0% of investment options OR Legends not clearly noted and trend plots not accurate for 50%-0% of investment options.
Articles	Articles for all companies present	Articles for 85% of the companies present	Articles for 75% of the companies present	Articles for 50% or less of the companies present
One-page summary	All four summary items are addressed	Three items are addressed	Two items are addressed	One or no items are addressed