

Foundations of Mathematics 12 Investment Portfolio Project

Introduction:

Investing in the stock market can earn you money if it is done correctly, or lose money if the market is treated as a source of gambling. The more you can learn about investing early, the better prepared you will be in the future when it comes to making stock market decisions. This project is intended to give you an introduction to building a stock portfolio and the returns that are possible.

Resources Needed:

Foundations of Mathematics 12 text or Internet text access
The GlobeInvestor website
A copy of the Saturday Vancouver Sun Business section
A spreadsheet program (Microsoft Excel)

Key Terms:

term, interest, fixed interest rate, principle, simple interest, maturity, future value, rate of return, compound interest, compounded annually, compounding period, Rule of 72, present value, portfolio

Activities: (this project runs from Oct 15 to Apr 30)

- 1) Attend a seminar where you will learn about choosing stocks. In this seminar you will learn about where to look for information on stocks
- 2) By October 15th, you will choose a portfolio of ten stocks listed on the Toronto Stock Exchange, and submit these choices to your marker. These stocks will not be changed for any reason, so choose wisely.
- 3) Build an Excel Spreadsheet that can be used to track your portfolio. Ask your marker if you need assistance with this process. The Spreadsheet shown below (last year's info) is a sample you can use to build your own. **Email this Spreadsheet to your marker.**

Stock Name	Symbol	Oct 15 value	Dec value	Feb value	Apr 30 value	Increased value	Percent increase	Yield %	Total return
General Electric	GE-N	16.22			20.07	3.85	23.74	4.19	27.93
...	

- 4) In December, meet with your marker to discuss the progress of your portfolio and update the Spreadsheet. **Email this Spreadsheet to your marker.**

- 5) In February, meet again with your marker to discuss your portfolio and update the spreadsheet.
Email this Spreadsheet to your marker.
- 6) On April 30th, this is the date that all stocks are considered sold, and you can prepare a final Spreadsheet that will be used in your evaluation of this portfolio.
- 7) Pick up the **Evaluation Handout** from you marker, and complete the activities. The Portfolio and Evaluation **must** be handed in by May 10th.

Evaluation:

Create a presentation to demonstrate your knowledge. Options include an interview, PowerPoint presentation, poster, video, brochure, ... etc. It is up to you how the evaluation will take place and be warned some methods take more time than others.