**ROSSMOYNE SENIOR HIGH SCHOOL**

**YEAR 9 FINANCIAL MANAGEMENT**

**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mark: / 40**

**Due Date: Week 10**

**SEMESTER 1 ASSIGNMENT - SHARE PORTFOLIO**

**Task: Individual Assignment**

You are to create a share portfolio using a hypothetical $50,000 and the prices as quoted on the Australian Stock Exchange (ASX). You will need to use the business section of the newspaper/news and ASX websites to determine prices.

**TASK SPECIFICATIONS**

* Your portfolio will run from week 5 until week 10 (Term 1).
* An investment limit of $50,000 applies.
* At least 75% of the investment cash must be invested in the stock market at all times.
* Dividends and brokerage are ignored.
* No more than four share parcels are to be purchased in any week and no more than two share parcels to be sold each week.

**TASK REQUIREMENTS**

1. Create a portfolio summary
   1. Include graphs detailing the fluctuations in your portfolio value
   2. Include a written summary of your share portfolio (200 words)
   3. Include the total profit/loss of your portfolio in **real value ($)** and **percentage (%)**
2. Conduct research into the companies you intend to invest in.
   1. Produce a **1 page** summary page for each company you invest in detailing any relevant information (company announcements, graphs, news articles etc.)
3. Conduct research into the Australian Stock Exchange.
   1. Over the five week period, graph fluctuations in:
      1. The S&P/ASX 200
      2. The All Ordinaries Index
   2. Produce a written summary of the fluctuations in the ASX (200 words).

**SUBMISSION REQUIREMENTS**

* Cover page
* Portfolio summary
  + Summary graphs
  + Written summary (200 words)
  + Total profit/loss
* Company research
* Market research
  + Graphs of S&P/ASX 200 and All Ordinaries
  + Written summary (200 words)
* Any additional notes
* Bibliography

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**SEMESTER 1 ASSIGNMENT - SHARE PORTFOLIO MARKING KEY**

|  |  |  |
| --- | --- | --- |
| **Content** | **Marks Allocated** | **Marks Awarded** |
| **Portfolio Summary**  Summary graphs included, set out correctly and accurate | 5 |  |
| Written summary clear, concise, relevant and informative | 5 |  |
| Total profit/loss recorded and accurate | 1 |  |
| Portfolio summary complete and all calculations are accurate | 1 |  |
| **Company Research**  Research included on **5** different companies | 5 |  |
| Summary is relevant, clear and demonstrates an understanding of company | 5 |  |
| Summary is set out correctly and neatly | 2 |  |
| **Market Research**  Market fluctuations are recorded in two separate graphs | 2 |  |
| Graphs are accurate and set out correctly | 2 |  |
| A written summary is included, relevant, clear and informative | 2 |  |
| **Total Marks (Content)** | 30 |  |

|  |  |  |
| --- | --- | --- |
| **Technology Process** | **Marks Allocated** | **Marks Awarded** |
| **Investigation**  Bibliography included | 1 |  |
| Bibliography is formatted correctly and is accurate | 2 |  |
| Has used multiple sources | 2 |  |
| **Producing/Creating**  Task is typed and proofread (free of spelling, grammar errors) | 2 |  |
| Information presented in attractive and creative format | 2 |  |
| Any additional information | 1 |  |
| **Total Marks (Technology)** | 10 |  |
| **TOTAL FOR ASSESSMENT** | 40 |  |