# YEAR 9 FINANCIAL MANAGEMENT

# SHARE PORTFOLIO ASSIGNMENT

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# Portfolio Graph & Analysis

Create a line graph of your portfolio value over the five weeks. (Two recordings per week is adequate).

Portfolio Analysis

Using the graph created, summarise what has happened to the value of your portfolio over the five weeks. (200 words)

Total Profit

Real Value ($) = $59,000 - $50,000 = $9,000

Percentage (%) = $9,000 / $50,000 = 18%

# Invested Companies

You should have **five pages** (one page per company invested in). Each page should contain information about the company (what does it do), market sector, competitors, why you’ve chosen to invest in it, any relevant news articles/information about the company, graphs, pictures etc.

# S&P/ASX 200 Graph and Analysis

Create a line graph of the S&P/ASX 200 value over the five weeks. (Two recordings per week is adequate). Values can be found on Yahoo Finance site - <https://au.finance.yahoo.com/q/hp?s=%5EAXJO>

S&P/ASX 200 Analysis

Define what the S&P/ASX 200 is. Using the graph created, summarise what has happened to the value of it over the five weeks - trend. Are there any reasons which could have accounted for the change in the S&P/ASX 200 over this period? (100 words)

# All Ordinaries Graph and Analysis

Create a line graph of the All Ordinaries value over the five weeks. (Two recordings per week is adequate). Values can be found on Yahoo Finance site <https://au.finance.yahoo.com/q/hp?s=%5EAORD>

All Ordinaries Analysis

Define what the All Ordinaries is. Using the graph created, summarise what has happened to the value of it over the five weeks - trend. Are there any reasons which could have accounted for the change in the All Ordinaries over this period? (100 words)

# Bibliography

Include a list of sources used - do not just provide the website link, it must be fully referenced.