

Task 5: Final Presentation

Time: 150-210 Minutes

Your final task is to prepare a report or presentation analyzing your portfolio's performance from start to finish. This assignment will evaluate your ability to connect your results to your strategy and reflect on key investment principles. The quality of your analysis and reflection is more important than the final value of your portfolio.

Instructions

Section 1: Executive Summary

This section provides a high-level overview of your quantitative results and the final composition of your portfolio.

- State your final portfolio value, your overall return percentage, and your final class ranking.
- Include a screenshot of the chart from your portfolio summary page that shows your performance against the S&P 500 benchmark.
- Look back at your Investment Strategy Document (Task 1). Did you meet your initial portfolio objective? In 2-3 sentences, explain specifically why or why not.
- Export and include a pie chart of your final portfolio holdings, categorized by industry/sector. In 1-2 sentences, describe the final composition.

Section 2: Debrief on Best & Worst Investments

This section requires a qualitative analysis of your key investments. You will explain the factors that drove your best and worst investments

A. Your Best Investment

- Identify your best-performing investment (highest percentage return).
- Why did you originally choose this investment? What did your initial research tell you?
- What factors—company performance, industry trends, or broader market events—do you believe led to its success?

B. Your Worst Investment

- Identify your worst-performing investment (lowest percentage return).
- Why did you originally choose this investment?
- What is the most important lesson you learned from this experience? Did you misjudge the company, misunderstand the industry, or did you face an unexpected market event?

Section 3: Strategy Review

This section is about accountability. How well did you follow your own rules? You will use your trade notes as evidence of your thought process.

- Review your [Investment Strategy Document](#). Discuss how well you followed your initial objective, risk plan, and asset allocation throughout the simulation.
- Your [Trade Notes](#) are the logbook of your journey. Export and review your notes from the platform. Select and reference one or two specific trade notes that serve as clear evidence of your strategic thinking in action.
- Did you make a conscious decision to revise your strategy at the midpoint? If so, explain the “before and after” of your strategy and justify why that change was necessary.
- Reflect on your trading behavior. Were your decisions driven by your strategy and research, or did you ever react emotionally to market news or short-term price changes?

Section 4: Developing Your Investor Mindset

In this final section you will identify areas for improvement, and begin building the mindset and principles that will guide your future investing decisions.

A. Evolving Your Strategy

How would a longer timeframe like a 7-year time horizon change your approach?

- How would you view a major market drop? Would it be a moment of panic, or a potential buying opportunity? Why?
- Would you have focused more on stable, established "blue-chip" companies, or would you have taken even more risks on small, innovative companies with high growth potential? Explain your reasoning.
- What was the single biggest emotional or psychological challenge you faced in the Stock Game?

B. Defining Your Core Principles

Identify two of the most important investing principles that you experienced while playing the Stock Game.

- Choose two from the list below, or research/write your own.
 - *Diversification is Essential, Patience is a Superpower, Time in the Market Beats Timing the Market, Never Invest in Something You Don't Understand, Know What You Own, Control Your Emotions, Price is What You Pay; Value is What You Get.*
- For each principle you chose, answer the following questions:
 - What does this principle mean to you now, in the simplest terms?
 - Describe an experience in the Stock Game that proved this principle's importance to you.
 - How will this principle guide your real-world financial decisions in the future?

Submission Checklist

Before you submit your Final Presentation, make sure you have completed all of the following:

- ☐ My report includes a clear Executive Summary with all required performance data.
- ☐ I have analyzed both my best and worst investments, explaining the reasons for their performance and the lessons learned.
- ☐ I have evaluated how well I followed my original Investment Strategy Document.
- ☐ My final reflection explains how I would invest differently over a 7-year timeline and what core principles I have learned.
- ☐ My final report or presentation is well-structured, clear, and professional.