

## Task 2: Weekly Portfolio Sync

**Time:** 10-15 Minutes

Successful investing isn't about checking your stocks every five minutes; it's about developing a consistent, disciplined routine. Each week, we will conduct a **Portfolio Sync**. This is your dedicated time to review the performance of your holdings, make strategic decisions, and track your thinking. After your individual sync, we'll discuss our findings as a class.

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### **Instructions**

Follow these four steps every week to build your investing habit.

#### **Step 1: Portfolio Snapshot**

Log in to your [PersonalFinanceLab](#) account. Get a quick overview of your portfolio's performance.

- What is your overall percentage gain or loss for the week?
- Which of your holdings had the biggest change (up or down)?

#### **Step 2: Investing Analysis**

Review your holdings against your **Investment Strategy Document**.

- Do your current investments still align with your objective?
- Do you have cash that needs to be invested according to your plan?
- Is any position so large that it unbalances your asset allocation?
- Execute trades **ONLY** if they are aligned with your strategy. Avoid emotional reactions.

#### **Step 3: Decision Log**

In a journal or document, briefly note the actions and observations from this week. This log will be used for your final report. *For example:*

- **Trades:** *"Bought 10 shares of MSFT because it aligns with my tech growth strategy and I had available cash."*
- **Holds:** *"My Apple stock is down 5% this week, but the company's long-term outlook is still strong, so I am holding per my strategy."*

#### **Step 4: Scanning the Markets**

Take a quick look at the market news headlines on PersonalFinanceLab or a financial news site.

- What was one major economic or business story this week? (e.g., interest rates, a big company's earnings report, new technology).
- How might this news affect one of the sectors or companies in my portfolio?