

Stock Game Investing Strategy

We are currently at the tail end of the Investing unit, and you have already begun to start to build your portfolio. You should also now know who your team members are – while each student has their own portfolio and makes their own trades, this is a group project based on the whole Team Portfolio.

Instead of having each student move off in their own direction, at this point you will need to work more closely with your team to build an overall Investing Strategy based on what we have learned so far throughout the unit. For this project, you will create an Investing Strategy Document to serve as the guide for how your team invests going forward.

Your Investing Strategy Document should consist of:

1. **Overall Objective Statement.** This can be a short sentence or a longer paragraph with specific points. Your Objective Statement should be the guiding philosophy of how your team makes trades going forward.
 - a. Are you going to try to get maximum returns, or a balanced approach?
 - b. And how do you plan to get there?
2. **Define The Roles of Each Team Member.** Each team member will be placing their own trades, but everyone should have a distinct role to reach your team’s objective statement.
 - a. For example, one team member may be focused on researching stocks from specific sectors or focus more on mutual funds and ETFs.
 - b. Alternatively, you can decide to have a “competitive team”, where each team member works more independently, but you still collaborate to discuss what has been going well or poorly with each team member to help refine your group performance.
 - c. You may also want to assign a specific Team Leader, who is responsible for making regular “status updates” with the team to make sure everyone is on the same page, or a “Team Secretary”, who will be responsible for the final creation of reports later in the class. However, establishing these roles is not necessary.
3. **For Each Team Member, Reflect on The Trades You Have Placed So Far.** Now that you have a strategy in place, what are your next steps with your portfolios? Have



your trades so far put you in a good position to pursue your new objectives, or will you need to sell off your holdings and start over?

4. **Create An Action Estimate.** Finally, make an estimate for how frequently each team member will need to trade for the rest of the class. Are you expecting to trade almost every day, or will you be picking several stocks and intend to hold them for most of the class?

Your Investing Strategy Document should be 1-2 pages in length. You will have the opportunity to update your Strategy Document later on in the class based on how the next few weeks of your portfolio evolve.