**Finance 3000 – Summer 2024**

**Stock-Trak Assignment**

Each student must join an investment team and participate in a portfolio simulation exercise managing $1,000,000 over the semester. The simulation is professionally conducted by Stock-Trak Portfolio Simulations.

The investment period will extend from June 25 through July 19. The fee per registered account is $19.99. Teams may have a minimum of three and a maximum of five students each.

I have set this up so that you are allowed to trade stocks, bonds, mutual funds, and ETFs. You can trade any stocks or bonds on any exchange that Stock-Trak allows. You can short-sell and buy on margin to whatever extent Stock-Trak allows. Trades can be submitted on the Stock-Trak webpage. Students will receive weekly statements showing account activity, value and performance. The Stock-Trak webpage has background resources for researching various investments. Further details can be found on the Stock-Trak website.

Assignment Requirements:

1. Send me an email with the name of your Team, along with the names of everyone in your team immediately **after you have registered** your team on Stock-Trak. You should register your team and begin trading as soon as possible.
2. At the end of the course, each team will prepare a performance report that (1) tracks the performance of their portfolio, (2) analyzes the financial markets and stock-specific news events that may have affected the risk and return performance of their portfolio, (3) explains the reasons for your trades, and (3) evaluates the relative (relative to the other teams and relative to “the market”) and absolute performance of your portfolio. The report should be no more than 5 pages long. I encourage you to share your results with the other teams and to compare yourselves to the “competition” in the final report. The report is due when you arrive to take your final exam.
3. You will be allowed to make up to 200 trades during the investment period (I believe that stock-trak will allow you to make more if you pay an additional fee. Should you choose to do so, that is fine with me). While there is not a required minimum number of trades for this assignment, I believe you will learn more by being active investors over the entire course of the month, and your grade will be at least partially dependent on this.
4. If you encounter any difficulties with your trades being executed, or any other problems with the StockTrak website, please contact StockTrak Customer Support. I cannot help you with any of those problems.
5. There will be one grade for your team. Each member of the team will receive the same grade, so carefully select who you want to work with. Your team’s grade will be based on the following criteria:
   1. Quality of the report
   2. How well you integrate what we cover in this course into your investment decisions and analysis
   3. Activity within your account
   4. How well your team works together
   5. How well your team follows instructions
   6. Professional presentation of your report
   7. Your performance relative to the other teams in this course

**Registering Your Team**

* As soon as you have your team in place, go to

[[**https://www.stocktrak.com/members/register?session=PersonalFinance\_2024**](https://www.stocktrak.com/members/register?session=PersonalFinance_2024)](https://www.stocktrak.com/members/register?session=PersonalFinance2022) and register. You are responsible for paying your team’s registration fee. You will need a Visa or Mastercard to pay the fee.

* Use your **team name** as the username. Do not use the name of someone on your team.
* Do not give out your team password to anyone outside your team, or you may find that you made some trades that you didn’t want to make.
* It is up to each team to determine who can make trades for your team. You may decide that all must agree on a trade, or that any team member can make trades at any time.
* Additional information and resources can be found at <http://www.stocktrak.com>