

Check Your Portfolio!

The purpose of this activity is for students to ensure that they are building a diversified portfolio by calculating the percentage each position takes up of their total portfolio balance. They will also gain experience in finding and researching stocks from different industries to gain a more comprehensive understanding of financial markets.

Part 1: Calculate

Each student should fill in the grid below with 8 companies that they have invested in, in their portfolios. Please use the largest investments in your portfolio. Include the Symbol, the Dollar Amount the investment is worth, and the company industry. Once you have this information, calculate the percentage that each position takes up in your portfolio.

HINT: To calculate the % Of Portfolio for a position, take the value of the position, divide it by the total value of your account, and multiply by 100.

Symbol	Position Value (\$)	Industry	% Of Portfolio

Part 2: Discuss

Students should create groups of 3-4 in order to discuss their findings. Then, each student in the group should try to make their portfolio more diverse by adding new industries to their portfolio. Using Rapunzl's Discover Search, find 3 new companies you have not heard of and add them to your portfolio. Each student should purchase at least \$100 of stock in 3 new companies. 2 members from each group will present 2-3 of the companies that the group decided to add to their portfolio and why.

Part 3: Incorporate Group Feedback

Once students have heard from individuals from each group, students should return to their group and discuss the companies that other groups invested in. Students should then decide 1-2 new companies to add to their portfolio.