**ADMN 5006 – Group Project**

Your team is asked to invest $100,000 by putting together a portfolio for a client. The client wants to make sure that a thorough research (including both fundamental & quantitative analysis) is performed by your team to ensure that the investment becomes a successful venture. You are required to perform the following and present them to the client with your recommendation. The client is looking for a portfolio that consists of 4-5 stocks.

**Group Presentation (100 pts)**

Your team is to present the findings to the client:

* Maximum 20 power point slides.
* Length of presentation limited to 20mins. There will be a timer.
* Your team is to provide a recommendation package for the client on how to allocate the $100,000.
* Please remember that your job is to convince the client to accept your recommendation by leveraging your findings from fundamental and quantitative analysis.

1. **Fundamental Analysis**

* Environmental analysis
* PESTEL, SWOT or your choice of environmental analysis.
* Industry analysis (based on the number of industries in your portfolio).
* Financial analysis
* Performing financial ratio calculation and explain the trend, causals and the outlook.
* Company analysis
* Understanding the current state of chosen companies based on qualitative research.

1. **Quantitative Analysis**

* Understand & comment on the past performances of each stock in your portfolio.
* Understand & comment on the covariance and correlation between each stock in your portfolio.
* Perform price prediction using Monte Carlo analysis for each stock and comment on their outlook.
* Perform analysis to optimize portfolio results and present findings.