**Presentation Guidelines**

You are free to structure your presentations to your liking, but students tend to have success with the following format.

* Title Slide
  + Include the name of the project and group members.
  + Comparing ESG returns to an Index Fund
* Motivation & Summary Slide
  + Define the core message or hypothesis of your project.
  + By investing in ESG funds-can an investor achieve the same returns as they would in an index fund? Are you sacrificing returns by investing in sustainable funds? Is there a tradeoff?
  + Describe the questions you asked, and *why* you asked them.
  + Is there a price to be paid for investing in “strong ESG funds”?

Investment Returns/Standard Deviation/Correlation/Beta/Sharpe ratios

Compare to the index (S&P500)

* + What type of funds are in the “strong ESG fund”?

Group by Morningstar Risk and Fund Category. Find the averages i.e. the average Large Blend has a risk of 3

* + Of the funds that outperform the index, which of the sustainability metrics do they score the highest in?

From the 3 metrics, is there a specific sustainability metric that is driving the outperformance?

Of the funds that outperform the index, if the E is strong, how does S and G compare? Is it some combination of the 3 metrics?

* + Financial analysis-how do certain ratios compare to the benchmark? Do the sustainable funds that beat the index also have higher/lower P/E, P/B, ROA, ROE, Projected EPS Growth, Yield
  + Describe whether you were able to answer these questions to your satisfaction, and briefly summarize your findings.
* Questions & Data
  + Elaborate on the questions you asked, describing what kinds of data you needed to answer them and where you found it.
* Data Cleanup & Exploration
  + Describe the exploration and cleanup process.
  + Discuss insights you had while exploring the data that you didn't anticipate.
  + Discuss any problems that arose after exploring the data, and how you resolved them.
  + Present and discuss interesting figures developed during exploration, ideally with the help of Jupyter Notebook.
* Data Analysis
  + Discuss the steps you took to analyze the data and answer each question you asked in your proposal.
  + Present and discuss interesting figures developed during analysis, ideally with the help of Jupyter Notebook.
* Discussion
  + Discuss your findings. Did you find what you expected to find? If not, why not? What inferences or general conclusions can you draw from your analysis?
* Postmortem
  + Discuss any difficulties that arose, and how you dealt with them.
  + Discuss any additional questions that came up, but which you didn't have time to answer: What would you research next, if you had two more weeks?
* Questions
  + Open-floor Q&A with the audience