

Portfolio and Risk Management

This week we will be reviewing the different investment sectors and managing the risk of a diversified portfolio. Make sure you read the required sections of the textbook as you will be quizzed on each of the chapters as referenced hereunder.

* Required

1. Part II: Value, Section 1 (pp.29 - pp.33) *

100 points

Check all that apply.

☐ I have read Value, Section 1 (pp.29 - pp.33)

2. What is the formula for Shareholders' Equity? *

20 points

Mark only one oval.

- ☐ Assets – Liabilities
- ☐ Revenues – Expenses
- ☐ Cash from Operations + Cash from Investment + Cash from financing
- ☐ Beginning equity + Total Comprehensive Income – Shareholders' net payout
- ☐ Other: _____

3. What is the formula for Net Income? *

20 points

Mark only one oval.

- ☐ Assets – Liabilities
- ☐ Revenues – Expenses
- ☐ Cash from Operations + Cash from Investment + Cash from financing
- ☐ Beginning equity + Total Comprehensive Income – Shareholders' net payout
- ☐ Other: _____

4. What is the formula for Change in cash *

20 points

Mark only one oval.

- ☐ Assets – Liabilities
- ☐ Revenues – Expenses
- ☐ Cash from Operations + Cash from Investment + Cash from financing
- ☐ Beginning equity + Total Comprehensive Income – Shareholders' net payout
- ☐ Other: _____

5. What is the formula for Ending Equity *

20 points

Mark only one oval.

- ☐ Assets – Liabilities
- ☐ Revenues – Expenses
- ☐ Cash from Operations + Cash from Investment + Cash from financing
- ☐ Beginning equity + Total Comprehensive Income – Shareholders' net payout

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