Investment Characteristics Comparison Chart

Activity 1: Rate and compare investment types across key characteristics

Instructions

For each investment type, rate the characteristic on a scale of 1-5. Click the number that best represents each investment's characteristic. Use the rating guide: 1 = Very Low, 2 = Low, 3 = Moderate, 4 = High, 5 = Very High.

Characteristic	Stocks	Bonds	Mutual Funds	ETFs
Potential Return (1=low, 5=high)	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
Risk Level (1=very safe, 5=volatile)	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
Liquidity (1=hard to sell, 5=easy)	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
Complexity (1=simple, 5=complex)	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
Minimum Investment (1=very low, 5=high)	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤
Income Generation (1=no income, 5=steady)	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤	① ② ③ ④ ⑤

Summary: Highest & Lowest by Category

Potential Return Highest: -- Lowest: --	**Risk Level** Highest: -- Lowest: --	**Liquidity** Highest: -- Lowest: --
Complexity Highest: -- Lowest: --	**Minimum Investment** Highest: -- Lowest: --	**Income Generation** Highest: -- Lowest: --

Part B: Real Examples Analysis

Metric	Apple (AAPL)	Vanguard Bond (BND)	S&P 500 ETF (VOO)
Current Price	$	$	$
1-Year Return %	%	%	%
Dividend/Yield	%	%	%
Expense Ratio	N/A	%	%
YTD Performance	%	%	%
Risk Rank (1-3)	1=highest risk		

Calculate: $1,000 Investment Value After 1 Year

Apple (AAPL): $ [value]

Vanguard Bond (BND): $ [value]

S&P 500 ETF (VOO): $ [value]

Checkpoint Questions

1. Which investment showed the highest return over the past year? Which showed the most volatility?

Your answer...

2. How much did fees (expense ratios) cost an investor with $10,000 invested for one year in each fund?

Your answer...

3. Based on these characteristics, which investment would you choose for a retirement account you won't touch for 30 years? Why?

Your answer...