Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Class Period:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Economics - Investment Planning Guide Assignment (40 Points)

1. Based on the Value Line Guide to Investments…What investor profile do you fall into? \_\_\_\_\_\_\_\_\_\_\_\_
2. Fill in the chart based on your investment guide.

|  |  |
| --- | --- |
| Asset Type | Percentage Owned |
| Large Growth |  |
| Large Value |  |
| Small Growth |  |
| Small Value |  |
| Foreign Stock |  |
| Emerging Market |  |
| Domestic Bond |  |
| High Yield Bond |  |
| Foreign Bond |  |
| Gold & Resources |  |
| Cash / Treasury Notes / CD’s / Securities |  |

1. Fill in the chart with regard to the purchases that you have made so far…

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Asset Type | Name of Stock | Ticker Symbol | Price | EPS | P/E Ratio | Market Cap |
| Large Growth |  |  |  |  |  |  |
| Large Value |  |  |  |  |  |  |
| Small Growth |  |  |  |  |  |  |
| Small Value |  |  |  |  |  |  |
| Foreign Stock |  |  |  |  |  |  |
| Emerging Market |  |  |  |  |  |  |
| Domestic Bond |  |  |  |  |  |  |
| High Yield Bond |  |  |  |  |  |  |
| Foreign Bond |  |  |  |  |  |  |
| Gold & Resources |  |  |  |  |  |  |
| Cash / Treasury Notes / CD’s / Securities |  |  |  |  |  |  |

1. Please take a screenshot of your Marketwatch Portfolio and attach it to this sheet. (e.g.)

