

FIN 685 Milestone Three Guidelines and Rubric

The final project for this course is the creation of an analysis and recommendations paper that demonstrates what you have learned about risk management in a real-world context. You will research a publicly traded company of your choosing and analyze it as a potential investment opportunity.

Prompt: In this milestone, you will submit a draft of the Investment Analysis section (II) and the Conclusion section (VI) of the final project. You will evaluate the perception of the company's stock and offer recommendations on this stock to potential investors and portfolio managers. Additionally, you will provide a conclusion and overall recommendation as to whether the company is a good investment opportunity.

Specifically, the following **critical elements** must be addressed:

II. **Investment Analysis**

- a) What is the **perception** in the market of this company's stock?
- b) How would you view this stock as an **individual** investor? Why?
- c) What **asset allocation strategy** might you recommend for including this company's stock in a portfolio? Be sure to justify your recommendation(s).
- d) How do you feel a **portfolio manager** would treat this stock and others from the same industry from an asset allocation perspective? What leads you to this conclusion?

VI. **Conclusion:** Based on your overall analysis, would you recommend your selected company as an investment opportunity over its competitors? Be sure to justify your rationale.

Guidelines for Submission: Your paper must be submitted as a 4- to 5-page Microsoft Word document with double spacing, 12-point Times New Roman font, one-inch margins, and at least 2 sources cited in APA format.

Rubric

Critical Elements	Proficient (100%)	Needs Improvement (75%)	Not Evident (0%)	Value
Investment Analysis: Perception	Reasonably characterizes the perception in the market of the company's stock	Characterizes the perception in the market of the company's stock, but response is cursory or illogical	Does not characterize the perception in the market of the company's stock	18
Investment Analysis: Individual	Reasonably characterizes how stock would be viewed from an individual investor's viewpoint and explains why	Characterizes how stock would be viewed from an individual investor's viewpoint, but response is cursory, illogical, or weakly defended	Does not characterize how stock would be viewed from an individual investor's viewpoint	18
Investment Analysis: Asset Allocation Strategy	Recommends an asset allocation strategy for including company's stock in portfolio and justifies recommendation	Recommends an asset allocation strategy for including company's stock in portfolio, but response or justification is cursory or illogical	Does not recommend an asset allocation strategy for including company's stock in portfolio	18
Investment Analysis: Portfolio Manager	Reasonably characterizes how a portfolio manager would treat this company's stock and others from the industry from an asset allocation perspective and explains conclusion	Characterizes how a portfolio manager would treat this company's stock and others from the industry from an asset allocation perspective, but response or explanation of conclusion is cursory or illogical	Does not characterize how a portfolio manager would treat this company's stock and others from the industry from an asset allocation perspective	18
Conclusion	Explains if selected company would be recommended as an investment opportunity over its competitors and justifies rationale	Explains if selected company would be recommended as an investment opportunity over its competitors, but response or justification is cursory or illogical	Does not explain if selected company would be recommended as an investment opportunity over its competitors	18
Articulation of Response	Submission has no major errors related to citations, grammar, spelling, syntax, or organization	Submission has major errors related to citations, grammar, spelling, syntax, or organization that negatively impact readability and articulation of main ideas	Submission has critical errors related to citations, grammar, spelling, syntax, or organization that prevent understanding of ideas	10
Earned Total				100%