

FIN 340 Module Two Activity Guidelines and Rubric

Overview: This activity will help you gather and analyze data relating to returns and standard deviations.

Prompt: Use <u>Yahoo! Finance</u> to get monthly pricing for the S&P 500 ETF (SPY), Coca-Cola, and Netflix for the past five years. Use the <u>provided instructions</u> to complete this activity.

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

- I. Calculate the monthly returns for S&P 500 ETF (SPY), Coca-Cola, and Netflix, supporting each calculation by showing the work involved.
- II. Calculate the average monthly return for S&P 500 ETF (SPY), Coca-Cola, and Netflix, supporting each calculation by showing the work involved.
- III. Calculate the **annualized returns** based on the monthly average return for S&P 500 ETF (SPY), Coca-Cola, and Netflix, supporting each calculation by showing the work involved.
- IV. Calculate the **standard deviation of monthly returns** for S&P 500 ETF (SPY), Coca Cola, and Netflix, supporting each calculation by showing the work involved.
- V. Calculate the annualized standard deviation based on standard deviation of monthly returns, supporting each calculation by showing the work involved.
- VI. Compare the **differences in returns and standard deviations** of the three sets of data and discuss their investment implications using a cell within the spreadsheet document.

Rubric

Guidelines for Submission: You must submit a completed Excel spreadsheet that fulfills the requirements outlined in the Module Two Activity Instructions document.

Critical Elements	Exemplary	Proficient	Needs Improvement	Not Evident	Value
Monthly Returns		Calculates the monthly returns for	Calculates the monthly returns	Does not calculate the	14
		S&P 500 ETF (SPY), Coca-Cola, and	for S&P 500 ETF (SPY), Coca-Cola,	monthly returns for S&P 500	
		Netflix, supporting each calculation	and Netflix, but calculations	ETF (SPY), Coca-Cola, and	
		by showing the work involved with	contain errors, or work to	Netflix, or provide evidence of	
		no errors (100%)	support calculations is not shown	the work to support each	
			(75%)	calculation (0%)	
Average Monthly		Calculates the average monthly	Calculates the average monthly	Does not calculate the average	14
Return		return for S&P 500 ETF (SPY), Coca-	return for S&P 500 ETF (SPY),	monthly return for S&P 500	
		Cola, and Netflix, supporting each	Coca-Cola, and Netflix, but	ETF (SPY), Coca-Cola, and	
		calculation by showing the work	calculations contain errors, or	Netflix, or provide evidence of	
		involved with no errors (100%)	work to support calculations is	the work to support each	
			not shown (75%)	calculation (0%)	



				Total	100%
		(85%)	main ideas (55%)		
kesponse	(2007)	are authoritative and properly cited	readability and articulation of	understanding of ideas (0%)	
	(100%)	grammar, with relevant sources that	that negatively impact	organization that prevent	
	and easy-to-read format	errors in spelling, syntax, or	spelling, syntax, or organization	spelling, syntax, or	
Response	is presented in a professional	concise, convincing, and free of	related to citations, grammar,	related to citations, grammar,	10
Articulation of	Meets "Proficient" criteria and	Submission is well-organized, clear,	Submission has major errors	Submission has critical errors	10
			(55%)	(070)	
			inaccurate and/or incomplete	(0%)	
Deviations	content (100%)	mivestment implications (65%)	implications, but comparison is	their investment implications	
Standard Deviations	content (100%)	investment implications (85%)	discusses their investment	three sets of data or discuss	
Returns and Standard	comparison demonstrates a deep understanding of the	of data and discusses their	of the three sets of data and	standard deviations of the	
Differences in	Meets "Proficient" criteria, and	Compares the differences in returns and standard deviations of the sets	Compares the differences in returns and standard deviations	Does not compare the differences in returns and	20
-:cc ·	Manta "Dunfiniant" pritoria	errors (100%)	calculations is not shown (75%)	support each calculation (0%)	20
		showing the work involved with no	errors, or work to support	evidence of the work to	
		supporting each calculation by	returns, but calculations contain	monthly returns, or provide	
Deviation		deviation of monthly returns,	standard deviation of monthly	based on standard deviation of	
Standard		deviation based on standard	standard deviation based on	annualized standard deviation	
Annualized		Calculates the annualized standard	Calculates the annualized	Does not calculate the	14
				(0%)	
		errors (100%)	not shown (75%)	to support each calculation	
		showing the work involved with no	or work to support calculations is	provide evidence of the work	
		supporting each calculation by	but calculations contain errors,	Coca-Cola, and Netflix, or	
Monthly Returns		(SPY), Coca-Cola, and Netflix,	ETF (SPY), Coca-Cola, and Netflix,	returns for S&P 500 ETF (SPY),	
Deviation of		monthly returns for S&P 500 ETF	of monthly returns for S&P 500	standard deviation of monthly	
Standard		Calculates the standard deviation of	Calculates the standard deviation	Does not calculate the	14
			not shown (75%)	support each calculation (0%)	
		involved with no errors (100%)	work to support calculations is	evidence of the work to	
		calculation by showing the work	calculations contain errors, or	and Netflix, or provide	
		Cola, and Netflix, supporting each	Coca-Cola, and Netflix, but	S&P 500 ETF (SPY), Coca-Cola,	
		return for S&P 500 ETF (SPY), Coca-	return for S&P 500 ETF (SPY),	the monthly average return for	
Returns		based on the monthly average	based on the monthly average	annualized returns based on	
Annualized		Calculates the annualized returns	Calculates the annualized returns	Does not calculate the	14