

FIN B385F (2022 Spring) Investment Management
Assignment 2 & Investment Experience Sharing
Due Date: April 14, 2022 5pm

1. **Logistics:**

- 1.1. Weighting: Assignment 2 (Investment Portfolio & Investment Report) will consist of 25% of the full course weighting. Details as below:

Task	% of Assignment 2 and ppt's Weighting (% of full course)	Nature	Overview
Assignment 2	100% (<u>25%</u>)		
2a. Investment Portfolio	40% (<u>10%</u>)	Individual	Investment Simulation
2b. Investment Report	60% (<u>15%</u>)	Individual	~1000 words investment summary

1.2. **Assignment 2 Investment Portfolio**

- 1.2.1. Please follow the Investment Project Details ("IPD") discuss in class
- 1.2.2. Regarding the assignment submission requirements details for the written report, please refer to P.3 in the course document

1.3. **Assignment 2 Investment Report**

- 1.3.1. Please indicate clearly your name and student ID on the cover page of your report
- 1.3.2. Regarding the assignment submission requirements details for the written report, please refer to P.2 in the course document
- 1.3.3. You MUST type out your Assignment written reports in **Microsoft Word** and submit the written reports via Turnitin on the OLE for plagiarism checking.

1.4. **Investment Evaluation Timeframe**

- 1.4.1. Your Investment Report will be based on the performance from Feb 7th, 2022 (HKT) till the end of business day April 9th, 2022 (U.S. EST).
- 1.4.2. Your Investment Portfolio Performance will continue till April 23rd, 2022 (U.S. EST). This will only affect the PnL ranking, but not the investment report.

2. Assignment 2 (25 marks total):

There are 2 parts:

A) Investment Portfolio Performance (10 marks) and

B) Investment Report (15 marks)

2.1. Investment Performance: 10 marks

2.1.1. **3-10 marks:** Please refer to the [Investment Project Details \("IPD"\)](#)¹ for this investment situation. The investment performance weight will be from 3 to 10 marks (equivalent to 3-10% of the entire course total), and depends on the specific performance listed in the IPD.

2.2. Investment Report: 15 marks (suggested words: ~1000)

2.2.1. **Big event since mid-Jan:** Please recoup major macro economic news that affect the market your investment focus into (200 words)

2.2.2. **Current Performances:** Evaluate your performance since portfolio's inception, up to end of business day on Apr 9th, 2022 (U.S. EST) (100 words)

2.2.3. **Previous Trades:** List all of your previous trades, including the amount, size (% of AuM), dates, please use a table to cover this one

2.2.4. **Lesson learnt:** Assess your investment strategy, and provide some lesson learnt (300 words)

2.2.5. **Tactical move:** Propose your next investment strategy or tactical move for your portfolio (200 words)

2.2.6. Student is required to focus on his/her portfolio, as different students shall have different investment experiences; hence, the report should be in YOUR own written words. Plagiarism is strictly prohibited

2.2.7. Students can refer to Assignment #2's Rubrics for marking standard

3. Investment Sharing (extra participation points):

3.1. Investment experience sharing will be held on the last week of lecture and tutorial sessions

3.2. Students are expected to prepare a very short speech (45 seconds) to describe how they invest during the last 2-3 months, their strategy, their lesson learnt, and their future plan (2 pages of powerpoint is recommended, but not mandatory)

3.3. Students who would like to share please inform your CIO on/ before Apr 24th, 2022 by email and send any presentation materials (if any).

3.4. Students participating in this 45-second investment sharing will have extra participation points - depending on the content and your comment from your CIO.

3.5. Your presentation should be in English.

¹ Link: <https://docs.google.com/document/d/18bDqjiVre3qwtVFGH85Xu8Wo65REflnSugzmNVFOik/edit?usp=sharing>
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