



## **INTER-HOUSE COMPETITION**

### **Design your Financial Portfolio**

**DATE:** July 2023

**CLASSES INVOLVED:** XI & XII

**NUMBER OF STUDENTS IN A TEAM : 02**

**Time limit : 5 – 8 minutes.**

### **DESCRIPTION OF THE ACTIVITY:**

Each team will be required to design their financial portfolio consisting of a combination of different investment options such as stocks, mutual funds, fixed deposits, government bonds or any other suitable investment instrument.

### **RULES AND REGULATIONS:**

1. Each team to have two students
2. Teams should conduct thorough research on different investment options, considering factors like risk, return, liquidity and investment duration. They should also analyse market trends, company performance and economic factors that may affect their chosen investments.
3. Based on their research and analysis, teams will design their financial portfolios by allocating the given budget across different investments. They should explain their investment choices, justify their allocations, and consider diversification to manage risk.
4. Each team will present their portfolio design to a panel of judges. The presentation should include an overview of their investment strategy, rationale behind the chosen investments, and expected returns.
5. The presentation is to be made in the form of a power point presentation.

### **CRITERIA FOR JUDGEMENT:**

- Knowledge and understanding of investment options.
- Risk management and diversification strategy.
- Clarity and coherence of the portfolio design.
- Research and analysis conducted.
- Presentation skills

Convenor :  
Ruby Singh

Head Mistress

Vice Principal

Principal