**Informal Assessment**

* Any and all of the following can be used as informal assessments:
* S & I Bingo #2 – You may hand out the bingo card found later in this lesson and have students copy the words from the board or document camera. You may also need a free space for this lesson.
* Pair‐share: teacher should write or type two company names to be distributed randomly to students. Each company name should also have a ratio name. After each student calculates that ratio for his/her particular company, each student will look for the other student who has the same company and ratio. That way they can compare their calculations and help each other if they got different answers.

**Formal Assessment**

* **Annual Report Analysis Assignment #**1‐Select two companies and conduct Internet research tolocate their annual reports. Create a table or diagram comparing at least 5 different ratios for the companies using the Balance Sheet, Income Statement, and/or Cash Flow Statements. Make a recommendation on whether or not investing in stock in these companies would be a profitable idea.
* **Mutual Fund Venn Diagram Assignment #2** – Create a diagram comparing and contrasting 3 differentmutual funds by searching online for ‘mutual fund prospectuses’. The outer circles will contain the name of the fund and the price per share of the fund. Include other pertinent information: a statement summarizing past performance of the fund, risks of the fund, management fees, and the investing strategy of the fund. These may be included in the outer circles as well, but any information that is common to all three funds should be placed in the overlapping parts of the circles in the Venn diagram.
* **Company SWOT Analysis Assignment #3** – Following the example of the SWOT analysis done as aclass, select a company (the teacher can randomly place company names under each chair in the room and the students can see which company name is under their chair) for which to conduct a SWOT analysis as an alternative investment strategy. This analysis may be done on a computer using any of the available templates online or manually on poster board or flipchart paper. Include an investment recommendation based on the SWOT analysis.