

High School Investment Challenge Presentation Judging Rubric

	Excellent (4 points)	Proficient (3 points)	Competent (2 points)	Advanced Beginner (1 point)	Score
<p>Present rational investment objectives/goals/philosophy and adhere to that policy:</p> <p><i>Define investment objectives and present how the trading strategies (including modifications during 8 weeks of investment) were designed and executed to reach investment objectives.</i></p>	<p>Extremely detailed investment objectives/goals/philosophy and clear explanation of how the trading strategies were designed and executed to reach investment objectives.</p>	<p>Semi-detailed investment objectives/goals/philosophy and clear explanation of how the trading strategies were designed and executed to reach investment objectives.</p>	<p>Somewhat detailed investment objectives/goals/philosophy and clear explanation of how the trading strategies were designed and executed to reach investment objectives.</p>	<p>Investment objectives/goals/philosophy and clear explanation of how the trading strategies were designed and executed to reach investment objectives not discussed.</p>	
<p>Have a valid explanation for the three best trades with the highest returns and three worst trades with the lowest returns. Explain why the trades above resulted in either a winning trade or a loss (trade reflection):</p> <p><i>Present trade’s motivation, explanation of the trades that were placed, and an analysis of current macroeconomy (including monetary policy, interest rates, inflation, business cycle conditions, and any other macroeconomic subjects) that is relevant to the trade. Select and use information to explain why trade did or did not work out according to expectations.</i></p>	<p>The trade strategy seems valid. Extremely detailed explanation of why the three best and three worst trades resulted in either a winning trade or a loss.</p>	<p>The trade strategy seems somewhat valid. Semi-detailed explanation of why the three best and three worst trades resulted in either a winning trade or a loss.</p>	<p>The trade strategy is not likely to be valid. Little detail in explanation of why the three best and three worst trades resulted in either a winning trade or a loss.</p>	<p>The trade strategy does not seem valid. No detail in explanation of why the three best and three worst trades resulted in either a winning trade or a loss.</p>	

Organization	The presentation was within the time restrictions (4–5 minutes), and it was extremely structured and organized (i.e., it flowed smoothly).	The presentation was close to being within the time restrictions (4–5 minutes), and it was semi-structured and organized (i.e., it flowed smoothly).	The presentation was not quite close to being within the time restrictions (4–5 minutes), and it was not very structured or organized (i.e., it did not flow smoothly).	The presentation was far from being within the time restrictions (4–5 minutes), and it was not very structured or organized (i.e., it did not flow smoothly) at all.	
Delivery	The presentation strongly held the audience’s interest. The students did a great job of speaking extemporaneously (i.e., did not read PPTs) and answering audience questions appropriately. Students presented in an extremely professional manner.	The presentation held the audience’s interest. The students did a decent job of speaking extemporaneously (i.e., did not read PPTs) and answering audience questions appropriately. Students presented in a professional manner.	The presentation somewhat held the audience’s interest. The students somewhat spoke extemporaneously (i.e., did not read PPTs) and answered audience questions appropriately. Students somewhat presented in a professional manner.	The presentation did not hold the audience’s interest. The students did not speak extemporaneously (i.e., did not read PPTs) or answer audience questions appropriately. Students did not present in a professional manner.	

Team Name: _____

Judge Name: _____

Total Score: _____/16.0

Comments: _____