



North Kingstown High School Anchor Assignment Assessment Plan

Department: **CAREERS**

Name of Course: **PERSONAL FINANCE AND INVESTING - 1123**

“Title” of Anchor Assignment: **INVESTMENT PORTFOLIO SPREADSHEETS**

What are students asked to do/create/write/present to complete this assignment?

STUDENTS WILL:

***Create a stock portfolio spreadsheet and line graphs using Microsoft Excel.**

***The spreadsheet will contain stock name, symbol, purchase price, number of shares purchased, money invested, current value of stock shares, gain or loss in each stock/total portfolio, and rate of return of each stock and entire portfolio.**

***Track changes in stock prices once a week for 9 weeks.**

***Graph changes in portfolio value and rate of return using line charts labeling dates and dollar values and percentages.**

***Create a written summary of their results including future expectations of the stocks within their portfolio.**

GSE(s) Covered by this Assignment:

- **Information Writing –W8**
- **NET’s - # 5 Technology Research Tools**

NKHS Expectation(s) for Student Learning Covered by this Assignment:

- **# 4 Written Communication**
- **# 5 Visual Communication**

Problem Solving

Depth of Knowledge (Check one)

_____ **Level 1- Recall of Information** - requires the student to write or recite simple facts. Does not include complex synthesis or analysis, but basic ideas. Level 1 requires students to demonstrate a rote response, perform a well-known algorithm, follow a set procedure (like a recipe), or perform a clearly defined series of steps.

_____ **Level 2- Basic Reasoning**- requires some mental processing, connecting ideas using a simple organizational structure. At this level, students are engaged in first draft writing for a limited number of purposes and audiences; Keywords that generally distinguish a Level 2 item include “classify,” “organize,” “estimate,” “make observations,” “collect and display data,” and “compare data.” These actions imply more than one step.

___ **X** ___ **Level 3- Complex Reasoning**- requires some higher level mental processing. Students are developing multi-paragraph compositions that may include complex sentence structures or demonstrate some synthesis and analysis. The cognitive demands at Level 3 are complex and abstract. The complexity does not result from the fact that there are multiple answers, a possibility for both Levels 1 and 2, but because the task requires more demanding reasoning.

_____ **Level 4- Extended Reasoning**- Higher-level thinking is central to this level. Multi-paragraph compositions demonstrate synthesis and analysis of complex idea or themes and evidence of a deep awareness of purpose and audience. Level 4 activities include designing and conducting experiments; making connections between a finding and related concepts and phenomena; combining and synthesizing ideas into new concepts; and critiquing experimental designs.

Is proficient completion of this assignment required for the e-Portfolio? Yes _____ No X_____

How will this anchor assignment be graded and weighed in the overall grading?

100 point scale; weighed as two assignment grades under the students class assignment section.

Outline the opportunities for students to revise their work.

The student has multiple opportunities to revise their work as this a quarter/semester long project. Students will hand in their initial portfolios for teacher review. The teacher will asses their individual portfolio and assist in modifying during class. Corrections can be made and re-submitted if needed. The teacher will also be available after to school assist with comprehension or revision of the portfolio, line graphs, or summary.