

Investment Presentation: 4-Point Rubric

Criteria	4 - Excelling	3 - Meeting	2 - Beginning	1 – Not Yet
Financial Content /16	In-depth, clear, accurate information about the investment option. All key points are addressed thoroughly with relevant detail. Relevant personal analysis.	Content is accurate with good coverage of most key topics. Some minor details are missing or underexplored. Includes relevant examples. Some personal analysis.	Basic content that covers some key topics but lacks depth or is somewhat incomplete. Some content may not be fully relevant.	Content is incomplete. Key topics are not addressed. Lacks personal insight.
Organization & Delivery /4	Well-organized presentation with clear structure and logical flow. Clear, confident delivery with smooth transitions.	Good organization with clear structure. Presentation is mostly easy to follow. Delivery is confident but may have a few minor pauses or unclear sections.	Organization is basic, but some parts of the presentation may be hard to follow. Delivery is somewhat hesitant or lacks clarity in parts.	Disorganized or unclear structure. Presentation is difficult to follow, with frequent pauses or unclear speech. Delivery lacks confidence.
Visuals & Engagement /4	Excellent use of visuals that complement and enhance the presentation. Visual aids are clear, well-designed, and engage audience.	Good use of visuals that support the presentation, though some visuals could be improved or more effectively integrated. Some engagement with the audience through visuals.	Visuals are used but are somewhat basic, cluttered, or lack connection to key points. Engagement is minimal.	Visuals are poorly designed or irrelevant. No real engagement through visuals.

