



Strategic Investing

Engage



“As long as he continues to come up with brilliant investment strategies that way, we’ll just leave him alone.”

Your Task



Do you know who Warren Buffett is? Do a little research and find out..... Saying he’s rich is an understatement!!

Explore [“50 Warren Buffett Quotes on Investing, Life, and Success”](#). Reading, a slideshow, and videos are included.

What are some of your favourite quotes?

Explore

Young People Not Investing?

What’s the deal? Please go through the google slideshow below.

[Young People Not Investing](#)

Your Task

Exit Ticket: What have you learned from this content? How can you apply it to yourself? Why would you apply it to your own investing future?

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| <p><i>What is your financial plan?</i></p> <p>Please watch the video and go through the google slide presentation below:</p> <p>Simple Financial Planning Investing for Retirement</p> | <p>Make anecdotal notes highlighting important information as you see fit.</p> |
| <p><i>The Investment Industry: Players (Financial Advisors, Online Brokerages, and Robo-Advisors)</i></p> <p>Please go through the content in the following google slide presentations:</p> <p>Financial Advisors Online Brokerages Robo-Advisors</p> | <p>Each slide has guiding questions reviewing the material explored. Please read the directions and use the guiding questions to create a brief Cornell Note for each topic.</p> |
| <p><i>The Investment Industry: Products (Vehicles) and Fees</i></p> <p>Please go through the video(s) and article below:</p> <p>Products and Fees Investment Fees Matter....</p> | <p>Your goal is not to be afraid of products and fees, but to understand them. Create anecdotal notes highlighting different products available, what they are, and the importance of fees on your portfolio.</p> |
| <p><i>The Investment Industry: Packaged Investment Products</i></p> <p>Please go through the content below:</p> <p>Packaged Investment Products How does MER work? Trailing P/E vs. Forward P/E</p> | <p>Create a rough visualization comparing the differing packaged investment products. In addition, note the importance of the Management Expense Ratios (MER) and Price/Earnings Ratios (P/E)?</p> |
| <p><i>Parking Your Investment Vehicles: Registered vs. Non-Registered Accounts</i></p> <p>Please read the following article and google slide presentation::</p> <p>Registered vs. Non-Registered Accounts Investment Vehicles</p> | <p>Please read through the article. Make mental notes on the main differences between Registered vs. Non-Registered accounts.</p> |
| <p><i>Parking Your Investment Vehicles: TFSA or RRSP?</i></p> <p>As a beginning investor, you should focus on getting to know all about these two</p> | <p>Answer the following:</p> <ul style="list-style-type: none"> • What is a TFSA? • When to use a TFSA? |

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| <p>registered accounts and how they work. Please go through the content below and begin to familiarize yourself with both.</p> <p>Tax-Free Savings Account Registered Retirement Savings Plan RRSP or TFSA: How to Choose (Video) TFSA vs RRSP: How to Choose? (Article)</p> | <ul style="list-style-type: none"> • What is an RRSP? • When to use an RRSP? <p>What would you open at this point in your life? Would you begin to invest in both?</p> |
| <p><i>Investing Strategies: Rules-Based Investing</i></p> <p>If Warren Buffett says something about investing, it's worth a listen. Please watch the video below.</p> <p>Warren Buffet's Top Rules For Investing</p> | <p>Highlight Warren Buffett's top rules for investing. Engrain these rules before beginning your investment journey.</p> |
| <p><i>Investing Strategies: Active vs. Passive Investing</i></p> <p>How are you going to begin your investing journey? Please go through the slide presentation and watch the videos within.</p> <p>Passive vs. Active Investing</p> | <p>Create comparative notes on passive investing vs. active investing. What strategy do you think will work for you at this point in your life? What about in the future?</p> |
| <p><i>Investment Analysis: Technical Analysis</i></p> <p>Part of understanding and choosing investments has to do with technical analysis. Now your economics unit comes into play; analyzing graphs. Please watch the video below:</p> <p>Investing Basics: Technical Analysis</p> | <p>Trend Support and Resistance Price Patterns Technical Indicators</p> |
| <p><i>Investment Analysis: Fundamental Analysis</i></p> <p>In addition to researching investment value using technical analysis, we need to also focus on the fundamentals. Explore the content below:</p> <p>Investing Basics: Fundamental Analysis</p> <p>Learning how to analyze specific metrics of financial statements is of utmost importance. Watch the videos below from renowned investor Phil Town to learn more:</p> | <p>Make a short-list of companies that you think you'd like to purchase stock from one day. Research the value of the company and whether their stock is worth purchasing or not using some of the fundamental analysis tools</p> |

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| <p>The 4 Most Important Financial Metrics Using a Balance Sheet to Analyze a Company What is an Income Statement? How Do You Read a Cash Flow Statement?</p> <p>Or what does Warren Buffet have to say about analyzing financial statement metrics?</p> <p>Warren Buffet and Interpreting Financial Statements</p> | <p>you learned about in the videos. Were there any companies that were overvalued? Were there any companies that were undervalued? What company's stock would you buy today?</p> |
| <p><i>Investing Strategies: What One is Right for You?</i></p> <p>There are so many options as to how to invest your money. Here are 5 Types of Investment Strategies:</p> <p>5 Types of Investment Strategies</p> | <p>INQUIRY: Research and take anecdotal notes on the types of investment strategies. There are sub-strategies in each investment type that may be of interest.</p> |
| <p><i>A Beginner's Guide to Building a Growth Portfolio: Investing Story of Sean O'Byrne</i></p> <p>Read the story of this 19-year old and how he constructed his growth portfolio.</p> <p>Beginner's Growth Portfolio</p> | <p>How can you relate to Sean O'Byrne? Explain why or why not.</p> |
| <p><i>Portfolio Construction: How to Start Investing in Canada</i></p> <p>Read the excellent article below on how to get started with investing in Canada. Investing can be quite scary but it's a lot easier than you think.</p> <p>How to Start Investing in Canada</p> | <p>Create anecdotal notes and refer to them in the following two areas.</p> |
| <p><i>Portfolio Construction: Opening Your Brokerage Account</i></p> <p>Watch the videos below outlining the steps on how to open a discount brokerage account with Questrade and a robo-advisor account with Wealthsimple.</p> <p>Opening a Questrade Account Opening a Wealthsimple Account</p> | <p>Outline the steps in creating a discount account through Questrade and robo-advisor through Wealthsimple.</p> |

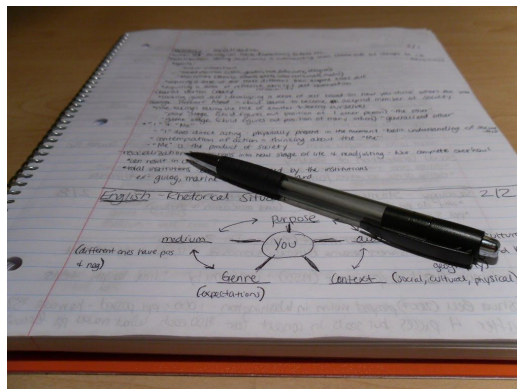
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| <p><i>Portfolio Construction: Canadian Couch Potato</i></p> <p>Perhaps the easiest investment portfolio to construct as a DIY investor is the Canadian Couch Potato Portfolio. This strategy aligns itself nicely with your “Millionaire Teacher” book study.</p> <p>Couch Potato Portfolio Overview Couch Potato Portfolio: Introduction Canadian Couch Potato</p> | <p>INQUIRY: Explore the Canadian Couch Potato website. Based on your goals, risk tolerance, time horizon, everything you’ve learned about certain assets, etc... how would you construct your portfolio?</p> |
| <p><i>Investing in your Portfolio: Dollar Cost Averaging</i></p> <p>What is Dollar Cost Averaging and does it work? Please watch the following videos to explore this question.</p> <p>What is Dollar Cost Averaging? Does Dollar Cost Averaging Work?</p> | <p>If you had \$10 000 to invest, would you use Dollar Cost Averaging? Please explain why or why not.</p> |
| <p><i>Measurements: Return on Investment (ROI)</i></p> <p>What is Return on Investment (ROI)? How to calculate ROI? What is a good ROI? Read the article and explore the ROI calculator below.</p> <p>Return on Investment (ROI) Explained Return on Investment (ROI) Calculator</p> | <p>Read the article and summarize: What is ROI? How do you calculate ROI? What is a good ROI?</p> <p>Explore and use the calculator for investments of interest to help further understand ROI?</p> |
| <p><i>Measurements: Rate of Return (ROR)</i></p> <p>What is Rate of Return (ROR) How to calculate ROR? What is a good ROR?</p> <p>Calculating Rate of Return</p> | <p>Investors like to track the progress of their investment using a metric called “rate of return.” Watch this video to learn how rate of return is calculated.</p> <ol style="list-style-type: none"> 1. What does rate of return represent? 2. What would it mean if your rate of return were negative? 3. In what way is rate of return on a stock similar to interest rate on a savings account? |
| <p><i>Measurements: The Value of Dividends</i></p> <p>Dividends are accelerants for investment</p> | <p>Highlight the importance of dividends in your</p> |

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| <p>portfolios. Companies offer dividends to attract investors. Read the following article and watch the video:</p> <p>40 Things Dividend Investor Should Know Why Investors Love Dividends</p> | <p>investments. What do you think are the most important points on dividends? Why do investors love dividends? Why can they be dangerous?</p> |
| <p><i>Measurements: Market Sentiment and Economics</i></p> <p>It is not only important to measure individual assets. It is also important to measure the market and economy surrounding the market. To further understand measurement techniques, please watch the video and follow along with the pdf.</p> <p>Market Sentiment and Economic Measurements</p> | <p>Make brief notes on each measurement technique. Challenge yourself by using the techniques with today's markets.</p> |
| <p><i>Measurements: Tracking Your Financial Goals</i></p> <p>You may track your financial goals using the 4 measurements read about in the article below.</p> <p>Tracking Your Financial Goals</p> | <p>After reading this article, how else would you track your financial goals?</p> |
| <p><i>Behavioural Finance</i></p> <p>Does investor rationality (or irrationality) affect investor decision-making? This is a new area of study. Watch the videos below.</p> <p>Behavioural Finance: Investor Irrationality</p> | <p>Summarize the important points of Behavioural Finance. Make anecdotal notes of how you can relate to these behaviours in our everyday life.</p> |
| <p>Explain</p> | <p>Your Task</p> |
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After each lesson in the Explore section, we will have a short question and answer/reflection period addressing any challenges you're having with the concepts.



Have all your notes, comments, illustrations you created from the lessons complete and ready to be assessed.



Apply

Post instructions for the method students will be using to apply their knowledge from the lesson.

Tip: Use images and bullet point steps to simplify the process.

Your Task

Include expectations for student creations. This could include due dates, links to rubrics, and instructions for turning work in.

The Investment Industry: Players (Financial Advisors, Online Brokerages, and Robo-Advisors)

Complete the triple venn diagram comparing the similarities and differences between financial advisors, online brokerages, and robo-advisors.

[Triple Venn Diagram](#)

Based on your research, what industry player would you go with? Explain.

The Investment Industry: Products (Vehicles) and Fees

Please complete the activity below. You will notice how significant fees are.

[Calculating Investment Fees](#)

Parking Your Investment Vehicles: TFSA or RRSP?

Complete the venn diagram comparing the similarities and differences between a TFSA and RRSP.

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| | <p style="text-align: center;">Venn Diagram</p> |
| <p style="text-align: center;"><i>Investing Strategies: Rules-Based Investing</i></p> <p>You may review the video below here:</p> <p>Warren Buffet's Top Rules for Investing (you already watched this video in the previous section)</p> | <p>Use Canva or Lucidpress to create a poster highlighting Warren Buffet's top rules for investing. This poster should appeal to audiences and attract them to invest.</p> |
| <p style="text-align: center;"><i>Investing Strategies: Active vs. Passive Investing</i></p> | <p>Complete the venn diagram comparing the similarities and differences between active and passive investing.</p> <p style="text-align: center;">Venn Diagram</p> <p>Read the article How to Use Passive Index Investing. This is a U.S. focused article but the content is relative. In your Calculating Rate of Return activity, you saw the potential danger in investing solely in one company's stock. This article explains an alternative strategy that helps you minimize risk while still having the potential for favorable returns. <u>Start reading at the heading "The Market is Dominated by..."</u></p> <ol style="list-style-type: none"> 1. What are some of the advantages of investing in a fund rather than individual company stock? 2. What is the primary difference between index funds and actively managed funds? |
| <p style="text-align: center;"><i>Investment Analysis: Technical Analysis</i></p> <p>This is a student directed/inquiry assignment meant to familiarize yourself with research companies stocks.</p> <p>You may review the video below:</p> <p>Investing Basics: Technical Analysis (you already watched this video in the previous section)</p> | <p>Pick two companies from below and research the value of the stock using some of the technical analysis tools you learned about in the video. These tools include: <i>Trend, Support and Resistance, Price Patterns, and Technical Indicators</i></p> <p style="text-align: center;"> Apple (NASDAQ:APPL) Air Canada (TSE:AC) Facebook (NASDAQ:FB) General Electric Company (NYSE:GE) Boeing CO (NYSE:BA) </p> <p>Write a short report (use screen shots of graphs or illustrations to help your point) convincing me: 1) What stock I should buy</p> |

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| | <p>2) What stock I should not buy Use www.investing.com to research your company of choice.</p> |
| <p><i>Investment Analysis: Fundamental Analysis</i></p> <p>This is a student directed/inquiry assignment meant to familiarize yourself with research companies stocks</p> <p>Review the material from the EXPLORE section if you need to.</p> <p>*Focus on P/E Ratios to analyze (Trailing and Forward)* *Use other fundamentals learned to analyze*</p> | <p>Pick two companies from below and research the value of the stock using some of the fundamental analysis tools you learned about in the video. These tools include: Balance Sheet, Income Statement, Cash Flow Statement</p> <p>Apple (NASDAQ:APPL) Air Canada (TSE:AC) Facebook (NASDAQ:FB) General Electric Company (NYSE:GE) Boeing CO (NYSE:BA)</p> <p>Write a short report (use screen shots of graphs or illustrations to help your point) convincing me: 1) What stock I should buy 2) What stock I should not buy</p> <p>Use www.investing.com to research your company of choice. Simply click on the "Financials" tab when you get to the company in order to research the financial information.</p> |
| <p><i>Investing Strategies: What One is Right for You?</i></p> | <p>Based on the "Sean O'Byrne" Beginner's Growth Portfolio article and the 5 Types of Investment Strategies article, determine and explain what investing strategy is right for you? Explain your reasoning based on learned concepts such as goals, risk tolerance, time horizon, knowledge and expertise, etc...</p> |
| <p><i>Investing in your Portfolio: Dollar Cost Averaging</i></p> | |
| <p><i>Measurements: Calculating Return on Investment (ROI) and Rate of Return (ROR)</i></p> | <p>Calculating Rate of Return</p> |
| <p><i>Measurements: The Value of Dividends</i></p> | <p>Analyze the Value of Dividends</p> |
| <p><i>Measurements: Market Sentiment and Economics</i></p> | |
| <p><i>Measurements: Tracking Your Financial Goals</i></p> | |

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| <i>Behavioural Finance</i> | |
| Evaluate | Your Task |
| <i>Portfolio Construction: Creating an Active Investing Portfolio and Passive Investing Portfolio (using Canadian Couch Potato Method)</i> | |
| <i>Case Study</i> | |