Course Project

Part Three Stock Selection & Allocation

# Benchmark

## Select an appropriate benchmark for your portfolio.

## Benchmark:

Why did you select the respective benchmark?

## Stocks Allocation

## Select at least five but no more than *12* stocks to include in your portfolio. Include the name of the company, ticker, currency, number for shares, total dollar amount allocated, end of day price (last price), volatility, industry classification, market capitalization, P/E ratio, D/E ratio, ROE, Cash Ratio, P/B ratio (market-to-book-value). Include your stocks in the Bloomberg portfolio you create in 2019. See the additional instructions on constructing a portfolio in Bloomberg.

## *Include list of stocks to be included in your portfolio in a separate Excel file.*

*Securities Data*

Include your Excel workbook when you submit your assignment.

*Risk Tolerance*

**Include any risk factors assumed by your security selection. Explain the risk factors for each stock, when necessary, and entire stock portion of your portfolio. What logic did you use in selecting the stocks you did with the given associated risks?**

## Planning for the next step

1. The more complete your list, the easier it will be for the final part of the project, measuring the performance of your portfolio.
2. You may begin calculating your return for the securities in preparation for the final portfolio analysis.
3. Organize your Excel workbook to include the bonds in one complete portfolio.