Southern New Hampshire University

Final Project Rubric

Guidelines for Submission: Your final submission should be 7–11 pages in length. The Investment Analysis Report should include a spreadsheet of your compiled data, a complete portfolio, and a 2- to 3-page executive summary. The total page length includes the executive summary but does not include title, reference pages, or the spreadsheet. It should be written in 12-point Times New Roman font, double-spaced, following the most recent APA standards for formatting and referencing.

Critical Elements	Exemplary	Proficient	Needs Improvement	Not Evident	Value
Company and Market Analysis: Financial Markets: Domestic Economy	Meets "Proficient" criteria, and analysis demonstrates keen insight into the relation of economic performance to financial markets (100%)	Analyzes the five-year performance of the domestic economy relative to the financial markets (90%)	Analyzes the five-year performance of the domestic economy relative to the financial markets, but analysis is cursory or contains inaccuracies (70%)	Does not analyze the performance of the domestic economy (0%)	5.28
Company and Market Analysis: Financial Markets: Asset Valuation Model Inputs	Meets "Proficient" criteria, and the database research used exemplifies advanced knowledge of performance and trends (100%)	Explains specific market performance data based on compiled asset valuation model inputs supported by database research of five-year sector and industry performance and current trends (90%)	Explains specific market performance data based on compiled asset valuation model inputs, but explanation is cursory, is not supported by database research of five-year sector and industry performance and current trends, or contains inaccuracies (70%)	Does not explain specific market performance data based on compiled asset valuation model inputs (0%)	5.28
Company and Market Analysis: Financial Markets: Macroeconomic Data	Meets "Proficient" criteria, and evaluation demonstrates keen insight into the impact of macroeconomic data on asset pricing (100%)	Evaluates the impact of the five-year and current macroeconomic data on asset prices (90%)	Evaluates the impact of the five-year and current macroeconomic data on asset prices, but evaluation is cursory or contains inaccuracies (70%)	Does not evaluate the impact of the macroeconomic data on asset prices (0%)	5.28
Company and Market Analysis: Company Valuation: Financial Items and Key Ratios	Meets "Proficient" criteria, and comparisons demonstrate keen insight into the relation of the company to industry peers in terms of key financial ratios (100%)	Analyzes the company's financial items and key ratios in order to demonstrate a comparison to peers and industry (90%)	Analyzes the company's financial items and key ratios in order to demonstrate a comparison to peers and industry, but analysis is cursory, comparison is incomplete, or response contains inaccuracies (70%)	Does not analyze the company's financial items and key ratios in order to demonstrate a comparison to peers and industry (0%)	5.28

Company and Market Analysis: Company Valuation: Intrinsic Value	Meets "Proficient" criteria, and explanations demonstrate advanced knowledge of how asset valuation models are used for determining intrinsic value of assets (100%)	Determines the intrinsic value of assets by inputting data into the various asset valuation models and explains how each model was applied (90%)	Determines the intrinsic value of assets by inputting data into the various asset valuation models, but determination contains inaccuracies, or asset valuation models are not used correctly, or lacks explanation (70%)	Does not determine the intrinsic value of assets (0%)	5.28
Company and Market Analysis: Industry Trends: Microeconomic Data	Meets "Proficient" criteria, and compilation demonstrates keen insight into the microeconomic data needed for asset valuation models (100%)	Compiles historic industry microeconomic data from database research for relative comparisons and inputs into asset valuation models (90%)	Compiles historic industry microeconomic data from database research for relative comparisons and inputs into asset valuation models, but compilation is incomplete or contains inaccuracies (70%)	Does not compile historic industry microeconomic data (0%)	5.28
Company and Market Analysis: Industry Trends: Absolute and Relative Performance	Meets "Proficient" criteria, and analysis demonstrates keen insight into how data can measure absolute and relative performance (100%)	Analyzes quantitative data across sectors and industries to measure absolute and relative performance (90%)	Analyzes quantitative data across sectors and industries to measure absolute and relative performance, but analysis is cursory, contains inaccuracies, or is not used to measure absolute and relative performance (70%)	Does not analyze quantitative data across sectors and industries (0%)	5.28
Company and Market Analysis: Stakeholders: Key Stakeholders	Meets "Proficient" criteria, and identification demonstrates keen insight into the needs of company stakeholders (100%)	Identifies five key stakeholders and their needs in relation to the company's portfolio (90%)	Identifies key stakeholders and their needs in relation to the company's portfolio, but does not identify five stakeholders, needs are inappropriately identified in relation to the portfolio, or response contains inaccuracies (70%)	Does not identify key stakeholders and their needs in relation to the company's portfolio (0%)	5.28

Company and Market Analysis: Stakeholders: Common Stockholders	Meets “Proficient” criteria, and identification demonstrates keen insight into objectives of common stockholders (100%)	Identifies the common stockholders’ primary objective and their required return on equity (90%)	Identifies the common stockholders’ primary objective and their required return on equity, but identification is inaccurate or does not take into account either the objective or return on equity (70%)	Does not identify the common stockholders’ primary objective or their required return on equity (0%)	5.28
Portfolio: Assets: Asset Classes	Meets “Proficient” criteria, and explanation demonstrates keen insight into the relationship between the risk/return trade-off, investment objectives, and asset classes (100%)	Explains the inclusion of specific asset classes for the portfolio, considering the portfolio’s risk/return trade-offs and the company’s investment objectives (90%)	Explains the inclusion of specific asset classes for the portfolio, but does not consider risk/return trade-offs or investment objectives, explanation is cursory, or contains inaccuracies (70%)	Does not explain the inclusion of specific asset classes for the portfolio (0%)	3.17
Portfolio: Assets: Allocation Weightings		Applies the asset allocation weightings across asset classes, sectors, and industries (100%)	Applies the asset allocation weightings across asset classes, sectors, and industries, but application is incomplete or contains inaccuracies (70%)	Does not apply the asset allocation weightings across asset classes, sectors, or industries (0%)	3.17
Portfolio: Securities: Historical	Meets “Proficient” criteria, and analysis demonstrates keen insight into how the company’s growth relates to its peers’ (100%)	Analyzes the company’s historical revenue and earnings growth in order to demonstrate a comparison to that of peers in the industry (90%)	Analyzes the company’s historical revenue and earnings growth, but analysis is incomplete, does not demonstrate a comparison to peers, or contains inaccuracies (70%)	Does not analyze the company’s historical revenue or earnings growth (0%)	3.96
Portfolio: Securities: Intrinsic Value	Meets “Proficient” criteria and demonstrates advanced knowledge of using asset valuation models in relation to intrinsic value (100%)	Determines the intrinsic value of assets, utilizing the asset valuation models (90%)	Determines the intrinsic value of assets, but determination does not utilize asset valuation models, is incomplete, or contains inaccuracies (70%)	Does not determine the intrinsic value of assets (0%)	3.96

Portfolio: Rates of Return: Historical	Meets “Proficient” criteria, and analysis masterfully uses the comparison of assets’ rates of return to similar securities or benchmarks for support (100%)	Analyzes the assets’ historical risk and rates of return, utilizing a comparison of the assets’ rates of return to similar securities or benchmarks for support (90%)	Analyzes the assets’ historical risk and rates of return, utilizing a comparison of the assets’ rates of return to similar securities or benchmarks, but analysis is cursory, is insufficiently supported, or contains inaccuracies (70%)	Does not analyze the assets’ historical risk and rates of return, utilizing a comparison of the assets’ rates of return to similar securities or benchmarks (0%)	3.96
Portfolio: Rates of Return: Calculate		Calculates required rates of return, utilizing various asset valuation models (100%)	Calculates rates of return, but calculations are incomplete or contain inaccuracies (70%)	Does not calculate rates of return (0%)	5.28
Portfolio: Risks/Return	Meets “Proficient” criteria, and comparison demonstrates keen insight into trade-off on investments (100%)	Compares the risk/return trade-off on the investments (90%)	Compares the risk/return trade-off on the investments, but comparison is incomplete or contains inaccuracies (70%)	Does not compare the risk/return trade-off on the investments (0%)	3.96
Executive Summary: Position	Meets “Proficient” criteria, and support used demonstrates keen insight into how investments can position a company in its industry and the market (100%)	Describes how making these investments will position the company within its industry in the market, supported with examples (90%)	Describes how making these investments will position the company within its industry in the market, but description is cursory, is insufficiently supported, or contains inaccuracies (70%)	Does not describe how making these investments will position the company within its industry in the market (0%)	5.28
Executive Summary: Benefits to Stakeholders	Meets “Proficient” criteria, and explanation demonstrates keen insight into how the stakeholders will benefit from the investments (100%)	Explains the benefits of the investments to stakeholders (90%)	Explains the benefits of the investments to stakeholders, but explanation is cursory or contains inaccuracies (70%)	Does not explain the benefits of the investments to stakeholders (0%)	5.28
Executive Summary: Investment Performance	Meets “Proficient” criteria, and the performance measurements utilized demonstrate advanced knowledge into assessing performance (100%)	Assesses investment performance, utilizing specific performance measurements (90%)	Assesses investment performance, utilizing specific performance measurements, but measurements used are inappropriate, or assessment is incomplete or contains inaccuracies (70%)	Does not utilize performance measurements to assess investment performance (0%)	3.17

Executive Summary: Risk/Return Metrics	Meets "Proficient" criteria, and examples used demonstrate keen insight into how risk/return metrics can be used to assess performance (100%)	Assesses investment performance based on risk/return metrics, citing specific examples (90%)	Assesses investment performance based on risk/return metrics, but assessment is cursory, is insufficiently supported, or contains inaccuracies (70%)	Does not assess investment performance based on risk/return metrics (0%)	3.17
Executive Summary: Investment Objectives	Meets "Proficient" criteria, and explanation demonstrates keen insight into the company's investment objectives (100%)	Explains how the strategies implemented in the portfolio meet the company's investment objectives (90%)	Explains how the strategies implemented in the portfolio meet the company's investment objectives, but explanation is cursory or contains inaccuracies (70%)	Does not explain how the strategies implemented in the portfolio meet the company's investment objectives (0%)	3.17
Articulation of Response	Submission is free of errors related to citations, grammar, spelling, syntax, and organization and is presented in a professional and easy-to-read format (100%)	Submission has no major errors related to citations, grammar, spelling, syntax, or organization (90%)	Submission has major errors related to citations, grammar, spelling, syntax, or organization that negatively impact readability and articulation of main ideas (70%)	Submission has critical errors related to citations, grammar, spelling, syntax, or organization that prevent understanding of ideas (0%)	4.95
				Total	**100%**