**Trading Assignment 6**

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| **Name:** |  |

Fill out the table with your 3 value and 3 growth stocks you originally chose for your portfolio. Then, visit the site <https://www.portfoliovisualizer.com/efficient-frontier#analysisResults>. Choose “Tickers” from the Portfolio Type drop down menu, then enter your 6 tickers in the “Efficient Frontier Assets” list. Then select “View”.

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| --- | --- | --- | --- |
| **Name and Ticker of Stock** | **Amount Invested** | **Value Today\*** | **Value or Growth** |
| 0.) *Richmond Inc. (RIC)* | $12,000 | $13,123 | Value |
| 1.)  |  |  |  |
| 2.)  |  |  |  |
| 3.)  |  |  |  |
| 4.) |  |  |  |
| 5.) |  |  |  |
| 6.) |  |  |  |

*\*“Today” can be any day around the time the assignment is due. This can be approximate.*

Take a screenshot of (1) the allocations and pie chart showing the Max Sharpe Ratio Portfolio, including the expected return, standard deviation, and Sharpe Ratio, (2) the efficient frontier, and (3) the “Assets and Correlations” tab. Include these screenshots on the next page(s). Make sure all screenshots are readable/legible!

In the box below (and in no more than 200 words) interpret the findings of the screenshots you present. How would your portfolio have differed had you followed these modern portfolio theory techniques? Do any of your stocks not appear in the portfolio? Why is that the case?

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