

A Letter to Investors

Every year, money managers write letters to their clients highlighting the performance of their portfolios. I would like you to do something similar. Imagine that your stock portfolio for the FSS MarketWatch Challenge was actually a fund that you managed for other investors. The \$1,000,000 came from a group of people who invested in your fund. Write a one-page letter to these investors explaining how their investment has performed since the beginning of the competition. The letter must be typed in Word and professional in appearance (a sample letter format is shown on the back). I would encourage you to use color in your letter – charts or graphs, your logo, a picture of the portfolio manager (you), etc. Here is what you need to include in the letter:

- What your investment strategy was.
- What stocks your fund invested in. Why?
- How those stocks performed. Why (look at your headlines)?
- How the overall “market” performed during this time. Compare this to your performance.
- Your thoughts on how your fund performed. If it was good, it was your brilliant ideas that made them money, right? If it wasn’t good, what “unforeseen” things happened (out of your control) to make them lose money?
- How the rest of 2019 looks for your stocks. Should they keep their money with you? Why?



My expectation for this project is that your letter will look like a professional document.
Take the time to make sure it does. Really show how much you've got!
(XC will be awarded for exceptional work!)

A Letter to Investors

SAMPLE BUSINESS LETTER

You R. Name
CEO, My Amazing Portfolio
10761 Pippin Road
Cincinnati, OH 45231

March 28, 2019

Dear Investor:

In your first paragraph, you will want to thank them for trusting their money with you ... and why this was a good idea.

In second paragraph, give some specific information about the stocks you chose to invest in, and why. Talk about how these stocks performed. If they did well, take credit for it. If not, blame something else!

In the third paragraph, be optimistic about the future. Talk about how great your portfolio will do for the rest of the year.

Sincerely,

You R. Name