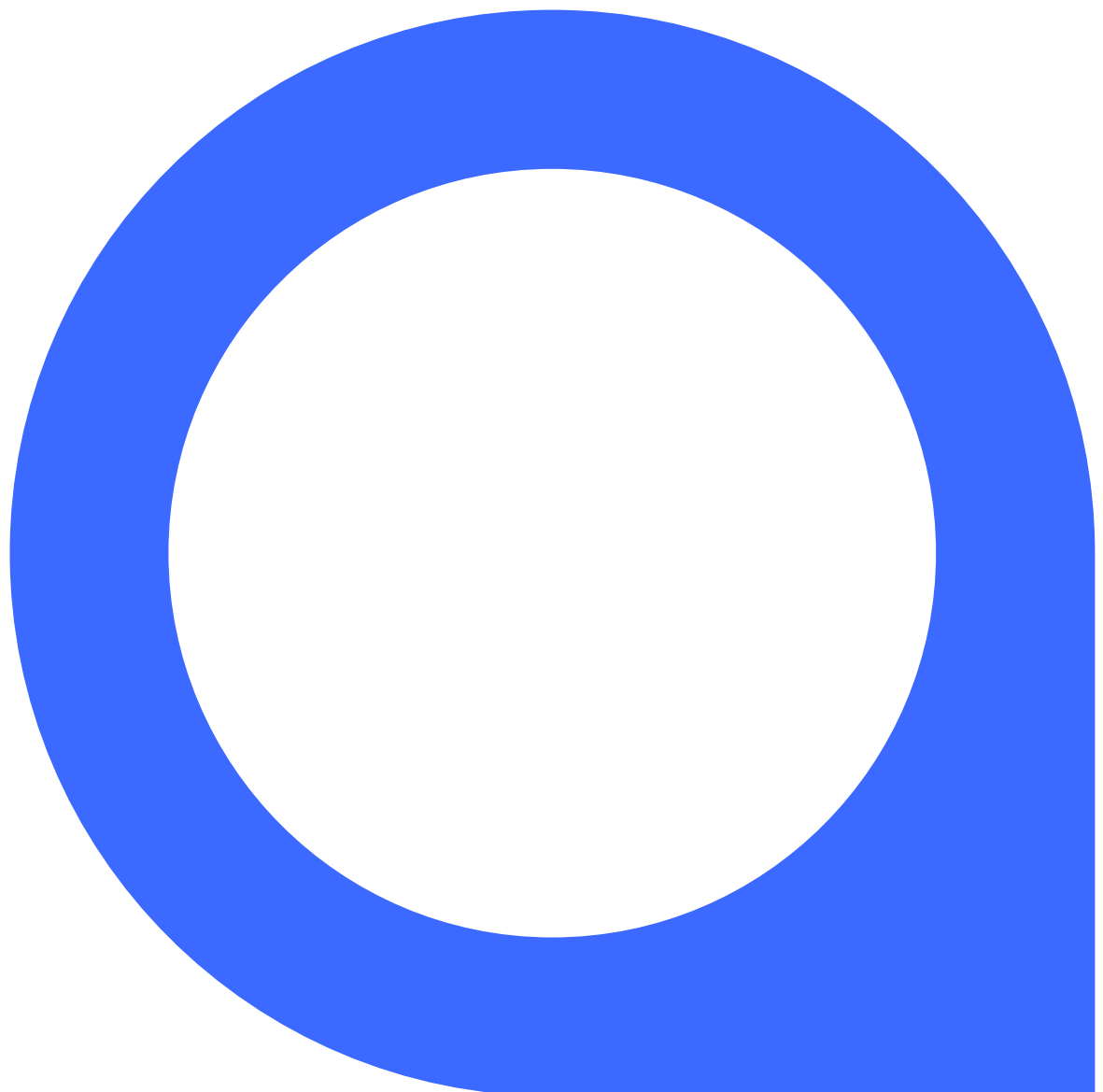


Investment

Assignment Rubric Semester 2 2025



Investment Assignment Semester 2 – Marking Rubric

Question	Weight	Significantly above pass level	Above pass level	Pass level	Below pass level	Significantly below pass level
		5	4	3	2	1
1 Explain what you consider to be the three most important factors that will influence the total returns of each of the following two asset classes: Large Cap US Equities and US Government Bonds over the next 5 years.	60% (12/20 marks)	Clearly and concisely explains the three most important factors for each of the two asset classes over the next 5 years. 2 marks (10% of the assignment) for each of 6 explanations containing reasons why each factor is considered one of the three most important, with 5 key points expected in each explanation; and All sentences are complete and grammatical; and All factors are accurately and completely explained; and The language is always appropriate to the readership.	Clearly explains the three most important factors for each of the two asset classes over the next 5 years. 2 marks (10% of the assignment) for each of 6 explanations containing reasons why each factor is considered one of the three most important, with 5 key points expected in each explanation; and All factors are mostly explained well enough to be understood by the reader; and The language is mostly appropriate to the readership.	Mostly explains the three most important factors for each of the two asset classes over the next 5 years. 2 marks (10% of the assignment) for each of 6 explanations containing reasons why each factor is considered one of the three most important, with 5 key points expected in each explanation; and Most factors are explained reasonably well but may in parts be unclear to the reader; and The language is mostly appropriate to the readership.	Does not explain all of the three most important factors for each of the two asset classes over the next 5 years; or Several factors are not explained and are unclear to the reader; or The language is not appropriate to the readership.	Does not explain most of the factors:

Investment Assignment Semester 2 – Marking Rubric

Question	Weight	Significantly above pass level	Above pass level	Pass level	Below pass level	Significantly below pass level
		5	4	3	2	1
2 Evaluate the capital market assumptions for the intermediate term (3 to 5 years) for Large Cap US Equities and US Government Bonds as forecast in the SSGA 2024 Q4 Long-Term Asset class Forecasts/ Q4 2024 document having regard to all the information and opinions that you have been provided with, and other information and opinions that you may have sourced, indicating the degree of uncertainty in the CMA.	40% (8/20 marks)	<p>The SSGA Capital Market assumptions for the intermediate term (3 to 5 years) for Large Cap US Equities and US Government Bonds are clearly and concisely evaluated, referring to all of the information provided and also to other information sourced to enhance the credibility of the evaluation: and</p> <p>Clearly indicates an assessment of the degree of uncertainty in the SSGA CMAs over the intermediate term of the next 3 to 5 years; and</p> <p>All sentences are complete and grammatical; and</p> <p>The evaluations and reasons for them are clearly set out; and</p> <p>The language is always appropriate to the readership.</p>	<p>The SSGA Capital Market assumptions for the intermediate term (3 to 5 years) for Large Cap US Equities and US Government Bonds are evaluated, referring to most of the information provided and also to other information sourced to enhance the credibility of the evaluation: and</p> <p>Indicates an assessment of the degree of uncertainty in the SSGA CMAs over the intermediate term of the next 3 to 5 years; and</p> <p>The evaluations and reasons for them are mostly explained well enough to be understood by the reader; and</p> <p>The language is mostly appropriate to the readership.</p>	<p>The SSGA Capital Market assumptions for the intermediate term (3 to 5 years) for Large Cap US Equities and US Government Bonds are evaluated, referring to most of the information provided; and</p> <p>Indicates some aspects of an assessment of the degree of uncertainty in the SSGA CMAs over the intermediate term of the next 3 to 5 years; and</p> <p>The evaluations are explained reasonably well but may in parts be unclear to the reader; and</p> <p>The language is mostly appropriate to the readership.</p>	<p>The evaluations and reasons for them are not clear or not complete or are not explained or are unclear to the reader; or</p> <p>The language is not appropriate to the readership.</p>	<p>The evaluations and reasons for them are not clear and are incomplete and are not explained or are unclear to the reader.</p>

Students are advised that a mark of zero (0) will be allocated for any question (or sub-question) where there is no attempt made or the marker finds the attempt is completely unsatisfactory.