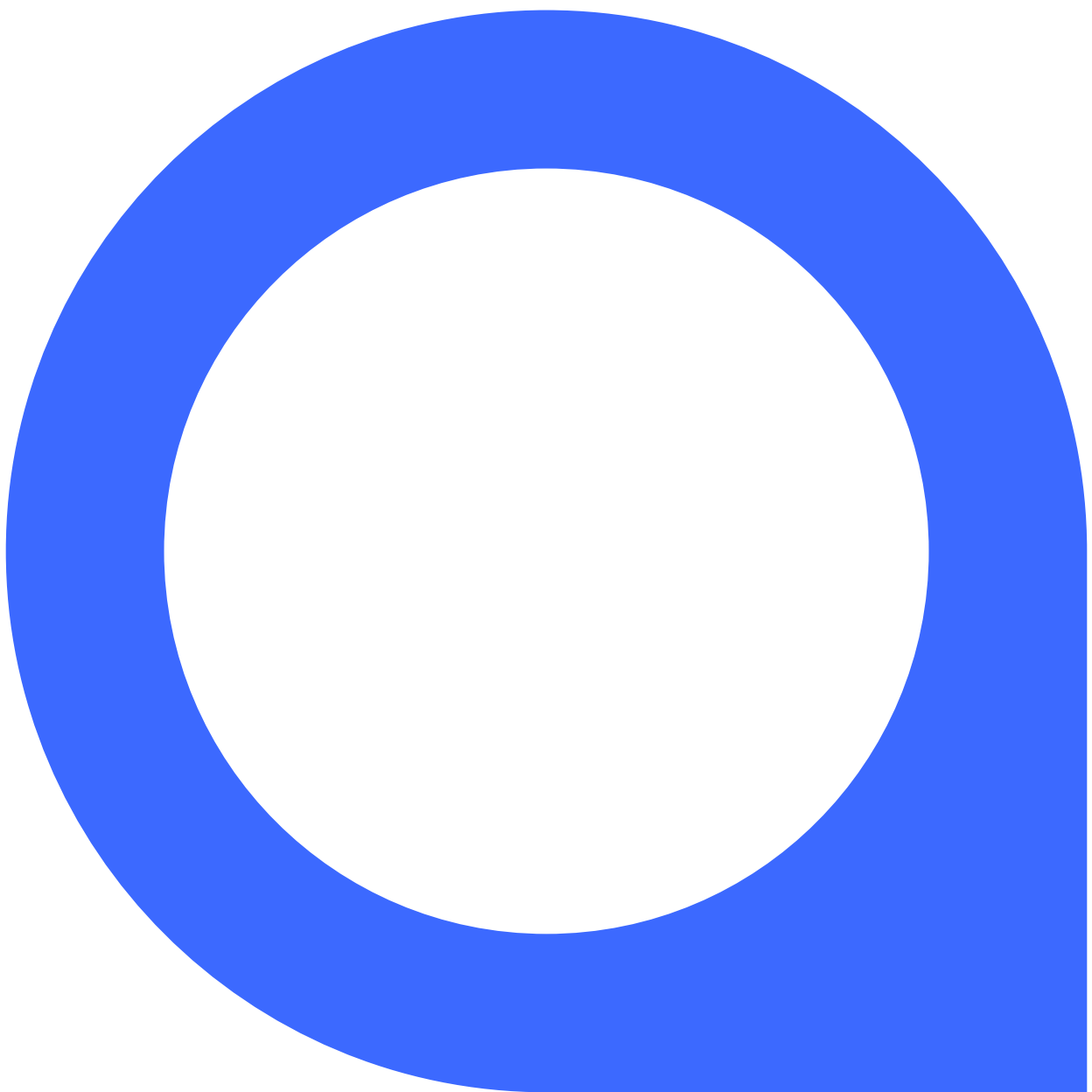


Asset Liability Management

Assignment Rubric Semester 1 2025



Question	Weight	Significantly above pass level	Above pass level	Pass level	Below pass level	Significantly below pass level
		5	4	3	2	1
A Liability Explanation	15% (3/20 marks)	Provides overview of the liabilities highlighting key points Clearly explains each element of the liabilities. Relevance of each element to asset portfolio requirements is clear.	Clearly explains each element of the liabilities. At least three explicit points on relevance to asset portfolio requirements	Clearly explains each element of the liabilities. One or two comments on asset portfolio requirements	The explanation of the liabilities is not clear The elements are not clearly identified.	The structure is neither explained nor elements identified.
B Summarise observations from data provided	15% (3/20 marks)	The summary of the observations is very clear Any graphs and tables used are clear, relevant and enhance the reader's understanding. Comments are logical and link observed results to conclusions.	Observations are presented in summary form. Graphs and tables focus on important aspects. Comments are logical and link observed results to conclusions	Observations are presented in summary form. Graphs and tables appear mostly relevant. Comments are logical.	Observations are not summarised with no conclusions Graphs and tables are mostly irrelevant. Some comments are illogical.	Observations are barely communicated or clearly illogical.

Question	Weight	Significantly above pass level	Above pass level	Pass level	Below pass level	Significantly below pass level
		5	4	3	2	1
C Explain the methodology	15% (3/20 marks)	Provides overview and explains all parts of the methodology. Explains all the required inputs and assumptions. Discusses any restrictions or limitations of applying the method to the scenario. Methodology is likely to generate sensible results that enable a recommendation	Explains all key parts of the methodology. Explains the required inputs and key assumptions. Methodology is likely to generate sensible results that enable a recommendation	Explains most but not all parts of the methodology. Identifies remaining steps. Methodology is likely to generate usable results.	Identifies the steps without explanation Not clear how the methodology will produce relevant findings	The methodology is not suitable at all.
D Justify assumptions in the model	20% (4/20 marks)	Each assumption is clearly sensible and justified. Effectively shows the conclusions from the data and links to the assumptions proposed. All material assumptions for both liabilities and assets included and on a consistent basis. Discussion of extent that assumptions are material to findings.	Each assumption is plausible and has relevant justification. Shows the conclusions from the data and links to the assumptions proposed. Consistency between assumptions for liabilities and assets.	The assumptions are plausible and justified Reasoning is consistent with the data but links may not be clear. Includes assumptions for both liabilities and assets.	The assumptions are stated but the justification is incomplete or illogical. The conclusions from the data are inconsistent with the data. Key assumptions missing.	The assumptions have little relevant justification and there is little connection with the data.

Question	Weight	Significantly above pass level	Above pass level	Pass level	Below pass level	Significantly below pass level
		5	4	3	2	1
E Recommend asset allocation of asset portfolio	20% (4/20 marks)	<p>The recommendation for the asset allocation is clear and specific and compared with other appropriate publicly available asset allocations.</p> <p>Reasons are well connected, logical, complete and justify the recommendation.</p> <p>Includes supporting evidence from modelling that also demonstrates why other allocations are less suitable.</p> <p>Possible risks are outlined.</p> <p>Cautions are included.</p>	<p>The recommendation for the asset allocation is clear and specific.</p> <p>Reasons are logical and justify the recommendation.</p> <p>Includes supporting evidence drawn from modelling for this allocation.</p> <p>Possible risks are outlined.</p>	<p>The recommended asset allocation is clear and specific</p> <p>Supporting reasons are clear and adequate.</p> <p>Some evidence of modelling carried out to test the allocation.</p>	<p>The recommendation for the asset allocation is not specific or clear.</p> <p>And/or, the reasons are not clearly communicated.</p> <p>And/or, no evidence of any modelling to test the allocation.</p>	<p>The recommendation for the asset allocation is confusing</p> <p>Or, it is not justified by the reasons given.</p>
F Clarity of Writing	15% (3/20 marks)	<p>Clear and concise structure, and use of charts/tables is effective to convey findings.</p>	<p>A clear structure and some use of charts/tables to convey findings</p> <p>All sentences are complete and grammatical. All paragraphs deal with a single theme.</p>	<p>Report has appropriate structure.</p> <p>Most sentences are complete and grammatical. Most paragraphs deal with a single theme.</p>	<p>Report not structured.</p> <p>A few sentences are incomplete and/or ungrammatical.</p> <p>Key concepts are not explained.</p>	<p>Incomplete report.</p> <p>Many sentences are incomplete and/or ungrammatical.</p> <p>Key concepts not dealt with.</p> <p>No examples.</p>

Question	Weight	Significantly above pass level	Above pass level	Pass level	Below pass level	Significantly below pass level
		5	4	3	2	1
		<p>All sentences are complete and grammatical. All paragraphs deal with a single theme.</p> <p>Key concepts are accurately and completely explained, with relevant examples.</p> <p>Spell-checked, has no errors, and the language is always appropriate to the audience.</p>	<p>Key concepts are explained with relevant examples</p> <p>Spell-checked, has no errors, and the language is mostly appropriate to the audience.</p>	<p>Key concepts are explained, with some examples</p> <p>A few spelling errors, but the language is generally appropriate to the audience.</p>	<p>Examples used are not clear or not relevant.</p> <p>Information (names, facts, etc.) are mostly accurate.</p> <p>Several spelling errors and at times the language is not appropriate for the intended audience.</p>	<p>Many spelling errors and often the language is not appropriate for the intended audience.</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.

