

Lesson plan

Year 11 | Session 6 | 'Decision-making investment game'

Learning objectives

1. Apply an investment strategy (low, medium or high risk) to calculate how an investment portfolio changes over time due to external events

Resources needed for the lesson [worksheets, print-outs etc]

- Year 11 | Session 6 | Decision-making investment booklet (1 per student or per pair)
- Calculators

Activity	Description	Timing
LO 1		
Introduction	Introduce the activity and allow students to have a quick look at their booklets. Then allocate each pair of students one of the three clients: Zara, Karim or Lucy.	5 mins
Stage 1	Students identify whether their profile is high, medium or low risk.	5 mins
Stage 2	Students review the key risks and complete Table 1, matching the 8 key risks to the 8 different investment options. Correct answers are found on the slides.	5 mins
Stage 3	Students are presented with the rules of the game and are given 5 minutes to allocate their £2,000 (£1,950 once the £50 has been deducted) to the various investments. They may play around with their ideas in Table 1 before putting in their final choices into Table 2.	5 mins
Stage 4	Walk through the worked example and reminder of how to calculate percentage changes. (5 mins) The teacher then walks through each of the 10 newsflash scenarios and students adjust the value of their investments accordingly.	25 mins
Stage 5	Students reflect on their learnings.	5 mins

Optional take home activity

Research - Students research different investment funds and investment options online, deciding what might suit their risk profile and explaining why.