



8-1 Discussion: Stock Portfolio Summary

In this discussion, you will need to log on to the TDAU thinkorswim platform one more time. Once logged on, review the status of your portfolio and respond to the following:

- Compute and tell the class your final rate of return on your stock portfolio using the start date of the project and (as the end date) the date of your initial post to this discussion. Be sure to include an "as of" date.
- Consider what you have learned in this course and tell the class which stocks you would purchase again and which ones you would not. Explain why.
- Tell the class why you believe your stock prices have changed while considering current financial news and information available. Would you want to have bonds or mutual funds in your investment portfolio? Why or why not?
- Address the quality of the stock and the company, risk, return, and diversification.

In your response posts to your classmates, advance the discussion by commenting on their investment decisions and opinions. Use your module resources to support your responses.

To complete this assignment, review the [Discussion Rubric](#) document.

Rubrics



[Discussion Rubric: Undergraduate](#)

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Week 8 Discussion

Ashley Creamer posted Oct 18, 2020 5:10 PM

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My stock options rate of returns as of 10/18/2020 are as follows:

- Walmart = -0.11%
- Southwest = 0.00%
- Uber = 0.00%

(ThinkOrSwim, Nd.)

My current value of my portfolio is approximately \$200,191.00 (as of 10/18/2020) this is only up \$29.20 since 10/1/2020.

My original assumption that Southwest would begin to rebound during this course was false. They have not yet rebounded, and it appears that it may be some time before COVID has allowed it to rebound. I should not have chosen this option for investing.

Uber, surprisingly has taken a turn downward after last reporting at 1.41% on 10/1/2020. I am concerned that it may not take off as quickly as I had expected.

Walmart, while negative at the moment, is a stock option I would continue to invest in. They seem to be the strongest option I chose and knowing as much as I do about the company I expect them to bounce back quickly.


If I were investing right now with my own money, I would choose to have my funds in mutual funds. That way they are strongly diversified and not based off of three companies. However, I would not invest any funds at this time due to the situation COVID has put our stock market in.

Reference:

TD Ameritrade. Thank or Swim. N.d. Retrieved from: <https://trade.thinkorswim.com/>

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 Reflect in ePortfolio



Activity Details

- Task: Reply to this topic

 Starts Oct 10, 2020 11:59 PM

Assessment



[Discussion Rubric:
Undergraduate](#)