



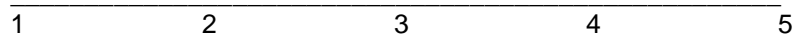
FOUNDATION

Activity Sheet 2: How Diverse is your SMG Portfolio?

On table below list the shares in your SMG Portfolio or planned portfolio. Use market cap to determine risk tolerance – A **Small Cap** company: Less than \$1 billion; a **Mid Cap** company: \$1 billion to \$5 billion; a **Large Cap** company: Over \$5 billion.

SMG ACCOUNT HOLDINGS			
Ticker Symbol	Shares Held	Company	Risk Tolerance
ESLR	300	Evergreen Solar	High, small market cap (659.85M)

On a scale from 1 to 5; with 5 the most diverse, rate your SMG portfolio:



ACTION PLAN: List the steps your team plans to diversify your SMG Portfolio.



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Putting Our Plan into Action: Review the chart and discuss your findings with your team. After completing the chart decide your investment strategies. Use market cap to determine risk tolerance – A **Small Cap** company: Less than \$1 billion; a **Mid Cap** company: \$1 billion to \$5 billion; a **Large Cap** company: Over \$5 billion. If your account holdings are classified as high risk, find ways to minimize the risk. Use the following web-sites to investigate other types of investment:

ETF – Electronic Traded Funds: <http://finance.yahoo.com/etf/education>

Bonds - http://finance.yahoo.com/bonds/bonds_101

Mutual Funds - <http://finance.yahoo.com/funds>

Investment Type– Stocks, Bonds, Mutual Funds, EFT	We selected this investment based on: <ul style="list-style-type: none"> • performance compared with other companies • market capitalization • potential for moderate and sustained growth other: specify 	Risk Tolerance Level High, Medium or Low (use market capitalization)	Share Ticker and Quantity