

# Portfolio Analysis

**Presenter: Christopher Anderson**

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**6<sup>th</sup> Grade Math & Science Teacher**

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# When do I know its Time to Sell?

## Have an Exit Strategy

[Video](#) - Portfolio Evaluation (SMG mini-lesson videos are available in the student portfolio, under the Resource tab)

- Limit your losses to 7% - 8%
- When to take profits?
- The 8 week hold rule!

[Link](#) - When should I sell my stocks?

# Portfolio Example

- Check your portfolio holding 2 or 3 times per week.
- Which stocks are up or down (5% - 10%)
- Should I sell or hold?

[Link](#) - Portfolio Example

# Possible Reasons for Stocks to Rise or Fall

Rise	Fall
New Products, New Services	Accidents or Health problems
Positive Leading Economic Indicators	Negative Leading Economic Indicators
Profit, Growth	Supply & Demand for Company's Stock
Company Take Over Bids	Investigation by the SEC

# Questions

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