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### **FIN 335 Milestone Two Guidelines and Rubric**

The final project for this course is the creation of a market analysis report that analyzes various organized global and domestic exchange markets and compares and contrasts performance for different investment products.

In this milestone, you will submit a draft of the Macroeconomic Environment (Section II) of the final project. You will focus on external factors that can cause markets to move as well as how and why those factors influence performance. External factors can include economic environments, social and political factors, and interest rates and inflation. You will also include an analysis of different investment vehicles (stocks, bonds, mutual funds, etc.) in different economic climates, which were discussed in Module Two. This information will be used later in the final report to inform your conclusions about the company's market selection.

Specifically, the following **critical elements** must be addressed:

- II. **Macroeconomic Environment.** This section should focus on external factors that can cause markets to move, and how and why those factors influence performance. You will use this information later in the report to inform your conclusions about the company's market selection. Specifically, you should:
  - A. Assess how different economic environments, such as **boom and bust** cycles, affect markets both individually and collectively. In other words, consider how economic growth or scarcity affects individual markets and how the economic environment for one market affects others. Support your answer with examples from different markets and economic periods.
  - B. Explain how **social and political** climates can affect market performance, risks, and returns. Use real-world examples from different markets to support your answer.
  - C. Analyze how **interest rates** and inflation affect market performance, using real-world examples from different economic periods to support your answer. For example, how do interest rates affect business borrowing, personal investment, and lending?
  - D. Compare and contrast how different types of **financial instruments**, such as stocks, bonds, mutual funds, and commodities, respond to different macroeconomic environments, analyzing how that might affect a company's IPO success. For example, are investors more likely to purchase shares of a newly listed company in certain contexts more than others? Will the cost of key commodities or services be higher in certain contexts?

**Guidelines for Submission:** Your paper must be submitted as a 2- to 3-page Microsoft Word document with double spacing, 12-point Times New Roman font, one-inch margins, and at least two sources cited in APA format.



### Rubric

Critical Elements	Proficient (100%)	Needs Improvement (75%)	Not Evident (0%)	Value
<b>Macroeconomic: Boom and Bust</b>	Assesses how different economic environments affect markets both individually and collectively, supporting answer with concrete examples from different markets and economic periods	Assesses how different economic environments affect markets individually and collectively, supported by examples, but response contains inaccuracies, omits key details, or examples are irrelevant or do not cover different markets and economic periods	Does not assess how different economic environments affect markets both individually and collectively, supported by examples	22
<b>Macroeconomic: Social and Political</b>	Explains how social and political climates can affect market performance, risks, and returns, using real-world examples from different markets to support answer	Explains how social and political climates can affect market performance but does not support answer with relevant examples from different markets, or response contains inaccuracies or omits key details	Does not explain how social and political climates can affect market performance, risks, and returns	22
<b>Macroeconomic: Interest Rates</b>	Analyzes how interest rates and inflation affect market performance, using real-world examples from different economic periods to support answer	Analyzes how interest rates and inflation affect market performance but does not support answer with relevant examples from different economic periods, or response contains inaccuracies or omits key details	Does not analyze how interest rates and inflation affect market performance	22
<b>Macroeconomic: Financial Instruments</b>	Compares and contrasts how different types of financial instruments respond to different macroeconomic environments, analyzing how that might affect a company's IPO success	Compares and contrasts financial instruments' responses to different macroeconomic environments but does not analyze effect on a company's IPO success, or response contains inaccuracies or omits key details	Does not compare and contrast how different types of financial instruments respond to different macroeconomic environments	22
<b>Articulation of Response</b>	Submission has no major errors related to citations, grammar, spelling, syntax, or organization	Submission has multiple errors related to citations, grammar, spelling, syntax, or organization that negatively impact readability and articulation of main ideas	Submission has critical errors related to citations, grammar, spelling, syntax, or organization that prevent understanding of ideas	12
				<b>Earned Total</b> 100%



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