

ECONOMIC COMMITTEE
STUDENT INVESTMENT GROUP
SPRING 2008

MATTHEW WOLFE: Co-Chair, SARAH BHAGWAT: Co-Chair

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Mission:

To provide the Portfolio Management Committee (PMC) with timely, accurate, and well documented convenient national and international economic data relevant to making superior portfolio management decisions.

Vision:

To be presenting a well-rounded economic picture to the PMC by the first week of April 2008 on a weekly and semester basis.

Strategy:

To release **weekly** reports containing the following information:

1. Diversification:
 - List of major industries, the percentages of each of these we hold in stock, and the specific tickers that we own displayed next to each industry;
 - Percentage small-, medium- and large-cap stock;
 - Percentage foreign and domestic stocks;
 - Percentage stocks, bonds, cash, and other.
2. Report on the economic data reported that week from this site:
<http://www.valueline.com/news/calendar.html>
3. Treasuries, Aaa, Aa, A and Baa Corporate Bonds yield curves.
4. Updates of Brazil, Russia, India, China, U.K., Canada, Japan, Germany, France and Italy, specifically about their main economic drivers and the performance of their main stock indices.
5. Updates on current U.S. economic conditions such as:
 - Subprime mess
 - Oil and gas, alternative energy sources
 - Performance of the DJIA, S&P500, Nasdaq, Russell 3000, Russell 2000, and Russell Midcap
 - Other situations the PMC requests monitoring of.

We will also release an **end of semester** summary report. All reports will be compiled by an Economic Committee member and emailed to the PMC Co-Chairs or Chair each week. The reports will also be printed and placed in two binders for the PMC and the Economics Committee to reference.

The reports should be easy to read, concise, and have a list of sources for that report.

Economic Committee Calendar (*Tentative*)

Meeting Day, Time & Place TBA (Probably Mon, Tues or Wed 5pm-6:00pm in the business building)

<u>Date (week of)</u>	<u>Topics</u>
Feb 4-8	Introduction; Welcome Packet (Due Next Week)
Feb 9 or 16	Kick-Off Event (bowling/laser tag/fun activity)
Feb 11-15	Present Sample Weekly Economic Report; Assign Reporting Responsibilities; email all reports to Matthew and Sarah by February 22 nd .
Feb 18-22	Provide feedback and discuss reports.
Feb 25-29	Provide additional feedback and discuss reports.
Mar 3 - May	TBA
TBA	Guest speaker
TBA	Guest speaker