

Stock Exchange of Mauritius

SEM YOUNG INVESTOR AWARD 2017 REPORT WRITING

1st part: Investment Plan

The Investment Plan is meant for you to justify your initial investment choice.

Top Down Approach (4 steps):

- 1. Analyse the broad macroeconomic, social and political environment.
- 2. Analyse industry specific influences on a particular company's earnings.
- 3. Explain alternative investment scenarios, incorporating different assumptions and what these different scenarios may mean for the performance of a particular company.
- 4. Company specific analysis, using financial ratios

2nd part: Investment Report

Key elements:

- 1. You should justify the swaps and/or re-investment of dividends/rights proceeds you obtained (if any) during the competition.
- 2. Company specific analysis, using financial ratios.
- 3. Gauge whether your portfolio has outperformed or underperformed the overall share market? Check it against SEM indices, namely SEMDEX and SEMTRI.
- 4. Be creative, illustrative and graphical in organising your ideas and analysis.