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Lancaster Royal  
Grammar School

## PFP Erasmus+ Module 3: Investing

### Learning objectives and Scheme of work

The following scheme of work is for guidance only. Delivery of content will depend on time availability, teacher expertise and preference and pupil preference.

| Week & Lesson | Subject content                                    | What students need to learn:   | Suggested activities/resources<br>(add Kahoot, pupil bklt, case study etc) web links, you tube/vid links  | Teaching points to note  |
|---------------|--|--|---|--|
|               | <b>INVESTING</b>                                   |  |   |  |
|               | 1.1 Before you start investing in the stock market | A: Legal restrictions<br>B: Why invest?<br>C: Practice account<br><br>D: Share investment competitions | <a href="http://www.share.com/investment-accounts/free-practice-account">www.share.com/investment-accounts/free-practice-account</a><br><br><a href="http://www.studentinvestor.org">http://www.studentinvestor.org</a><br><a href="http://www.shares4schools.co.uk">www.shares4schools.co.uk</a> | Try and start saving from a young age. Investing in shares can be a part of a balanced portfolio of wealth |
|               | 1.2 Introduction to investing                      | A: Choose your broker<br>B: Opening a share dealing account  | <a href="http://www.money.co.uk/share-dealing.htm">www.money.co.uk/share-dealing.htm</a>  | It is not difficult to start   |

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|  |                                    |  |   |   |
|--|------------------------------------|--|---|---|
|  | 1.3 Types of investment            | <p>A: Shares<br/>B: Investment and unit trusts<br/>C: Exchange traded funds (ETF)<br/>D: Others (bonds &amp; preference shares)<br/>E: ISA's</p>           | <p><a href="https://www.share.com/a-guide-to-investing">https://www.share.com/a-guide-to-investing</a></p> <p><a href="https://www.share.com/a-guide-to-investing/all-about-isas/what-is-an-isa">https://www.share.com/a-guide-to-investing/all-about-isas/what-is-an-isa</a></p> | Keep it simple. Focus on shares and funds.                  |
|  | 1.4 Making a trade (step by step)  | <p>A: Research<br/>B: Locate the share on the dealing platform<br/>C: Find the current price<br/>D: Select the amount to invest<br/>E: Place the trade</p> | Go through the process on a practice account or in an investment competition  | Using a practice account before real investing is important |
|  | 1.5 Costs of investing             | <p>A: Dealing fee<br/>B: Spread<br/>C: Stamp Duty</p>  | <p><a href="https://www.share.com/investment-accounts/services/dealing-costs">https://www.share.com/investment-accounts/services/dealing-costs</a></p>  | Fees and trading costs can damage your wealth. Be careful!  |
|  | 1.6 Investment aims and strategies | <p>A: Growth<br/>B: Income<br/>C: Balanced<br/>D: Strategies such as value investing and trend investing</p>   | <p><a href="https://www.share.com/globalassets/assets/downloads/guide_to_investing.pdf">https://www.share.com/globalassets/assets/downloads/guide_to_investing.pdf</a></p> <p>p7-10</p>   | Investor personality and age plays a key part in this.      |

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|  | 1.7 Reading the financial papers | A: Learn to understand how share information is presented   | <a href="https://www.share.com/globalassets/assets/downloads/guide_ft.pdf">https://www.share.com/globalassets/assets/downloads/guide_ft.pdf</a>  | Do not be intimidated.  |
|  | 1.8 Common errors when investing | A: List of common errors  |  | Learn from your mistakes.<br>Read about investing               |
|  | 1.9 Reducing risk when trading   | A: Stop losses<br>B: Trailing stops<br>C: Pound cost averaging?<br>D: Limit buy<br>E: Set up alerts | <a href="https://www.share.com/globalassets/assets/downloads/guide_trading.pdf">https://www.share.com/globalassets/assets/downloads/guide_trading.pdf</a><br><br>p12-15  | Always manage your risk when trading                            |
|  | 1.10 Compounding                 | A: How it works<br>B: What to purchase<br>C: Time is key  | <a href="http://www.thecalculatorsite.com/finance/calculators/compoundinterestcalculator.php">www.thecalculatorsite.com/finance/calculators/compoundinterestcalculator.php</a><br><br><a href="http://www.fool.co.uk/ten-steps-to-financial-freedom/step-1-the-miracle-of-compound-returns/">www.fool.co.uk/ten-steps-to-financial-freedom/step-1-the-miracle-of-compound-returns/</a> | The best investment method of all for the majority of investors |
|  | 1.11 Glossary of key terms       | A: Knowledge of key investment terms  | <a href="http://www.share.com/glossary">www.share.com/glossary</a>   | Understanding the jargon really helps                           |

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