

NAME: _____

DATE: _____

ACTIVITY

What's Influencing the Investor?

What + Why: Explore how emotions and patterns in thinking can influence financial decisions and identify strategies for making more clear-headed choices when it matters most.

Instructions:

1. Read each investor scenario.
2. Complete the chart by:
 - Describing the context of what is happening in each decision.
 - Identifying what the investor may want to consider before making the decision.
3. Wait to fill in the Potential Behavioral Bias and One Way to Reduce This Bias columns. These will be filled in during the class-wide debrief.

Scenarios

Investor 1—Kenji

Kenji invests all his savings into a stock that recently doubled in value after seeing several headlines about how quickly the company is growing. Kenji expects the stock to keep rising.

Investor 2—Marshall

Marshall owns an investment that has dropped significantly in value. Even though he no longer feels confident about the investment, he refuses to sell because he does not want to accept the loss.

Investor 3—Avery

Avery decides to invest in a company after seeing many people on social media claim the stock is “guaranteed” to keep rising. She does not spend much time researching the investment herself.

Investor 4—Dmitri

Dmitri feels confident about an investment and mostly reads articles and posts that support his opinion. He quickly ignores negative reports or warnings about the investment.

Investor 5—Yara

After making a few successful trades, Yara becomes confident that she can predict which investments will increase in value next. She starts relying more on instinct than careful research.

Fill out the chart

Investor	Context of What is Happening	What They May Want to Consider	Potential Behavioral Bias	One Way to Reduce This Bias
Kenji	sdfsdf			
Marshall				
Avery				
Dmitri				
Yara				