

NAME: _____

DATE: _____

CASE STUDY

Pathway Performance

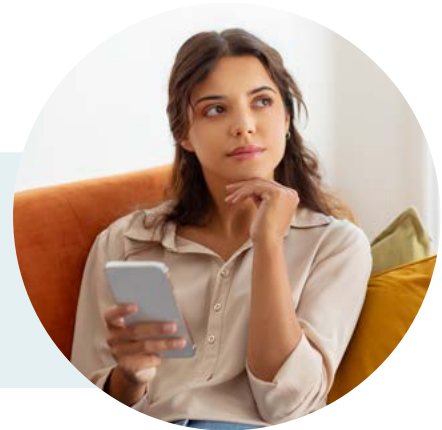
What + Why: Explain how inflation, diversification, and time horizon impact investment outcomes using specific evidence from Amara's pathways.

In real life, investment outcomes depend on risk, timing, and changing conditions. Use what you've learned to explain how each of Amara's pathways performs over time and why those differences matter.

Supporting Materials:

Investing Pathways (Ages 23-30) (Case Study)

Time Jump: Ages 23-30 Analysis (previously completed)

**Instructions:**

Using evidence from the case study chart and your previous work in the **Time Jump: Ages 23-30 Analysis**, write answers to the following questions (cite at least two specific data points from the case study chart to support your reasoning).

1. Explain the role of inflation in telling this financial story.

Pathway Performance Rubric

Criteria	4 – Strong	3 – Proficient	2 – Developing	1 – Beginning
Analysis of Inflation and Real Returns	Clearly explains how inflation affects purchasing power and investment outcomes, using specific evidence from the case study. Accurately distinguishes nominal and real value.	Explains inflation's impact and uses some case evidence accurately.	Shows partial understanding of inflation or uses limited evidence.	Shows minimal or inaccurate understanding of inflation and real returns.
Analysis of Diversification and Downturn Outcomes	Clearly explains how diversification affects each pathway's balance among growth, volatility, and resilience in Condition 2 and uses specific data to analyze short- and long-term outcomes.	Explains how diversification affected outcomes with some accurate evidence.	Shows partial understanding of diversification's impact or uses limited evidence.	Shows minimal or inaccurate understanding of diversification and downturn outcomes.
Analysis of Trade-Offs, Time Horizon, Investment Strategy, and Pathway Strengths	Thoroughly explains trade-offs across pathways, clearly connects time horizon and diversification to each pathway's strengths and limitations, and identifies which pathway most resembles active or passive characteristics, using evidence to explain what that means for long-term outcomes.	Explains major trade-offs and connects pathways to time horizon or diversification and makes a reasonable active vs. passive distinction for at least one pathway.	Identifies some trade-offs but explanation lacks depth, connections are partial, or the active vs. passive dimension is mentioned without being connected to outcomes.	Provides minimal or inaccurate explanation of trade-offs, pathway differences, or investment strategy approach.