

Financial Literacy Lessons and Activities for The Ontario
Geography Curriculum

Socially Responsible Mutual Funds

An activity package

For:

Grade 9 Canadian Academic Geography

CGC1D

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Unit and/or Day: Socially Responsible Mutual Funds		Grade 9D
<p><u>Time Circle:</u></p> <p>270 minutes</p> <p>3-4 classes</p>	<p><u>Learning Expectations</u></p> <p>Global Connections <u>Overall Expectations</u> By the end of this course, students will:</p> <ul style="list-style-type: none"> • describe how Canada’s diverse geography affects its economic, cultural, and environmental links to other countries; • analyze connections between Canada and other countries; • report on global issues that affect Canadians. <p><u>Specific Expectations</u> Building Knowledge and Understanding – summarize significant contributions Canada makes to the world (e.g., in peacekeeping, telecommunications technology, humanitarian aid, sports, arts);</p> <p><u>Developing and Practicing Skills</u> – evaluate Canada’s participation in organizations that deal with global issues (e.g., global warming, biodiversity, human rights); – summarize ways in which the economies of Canada and the rest of the world are interdependent;</p>	<p><u>Materials</u></p> <p>Chart Paper</p> <p>Markers</p> <p>Handouts (Activities 1-5)</p> <p>Projector (Not necessary but good for showing the websites and PowerPoint)</p> <p>Computer Lab (Not necessary but helps with activity two)</p> <p>There is a PowerPoint of some of the important concepts included. Use it in addition to the activities if you wish.</p>

		Assessment Opportunities
<p><u>Before – Activation Minds On!</u></p>	<p>A. Show the students the three short videos on mutual funds on the <i>Khan Academy</i> website. (10 minutes)</p> <p><u>Activity One: Understanding Mutual Funds</u> Have the students’ test their knowledge of what a mutual fund is by completing the short fill in the blank activity sheet. (15 minutes)</p> <p>* <u>Investment Journal</u>- When the students are done their worksheets they are to answer the questions posed on the activity one worksheet in their investment journals. If they do not finish this in class they should do it for homework. (5-10 minutes)</p> <p>B. The students will then explore the <i>Globe and Mail Investment</i> website. Review one of the mutual fund portfolios with the students. Follow the steps below to get to this area of the website. (30 minutes)</p> <ol style="list-style-type: none"> 1. Go to the <i>Globe and Mail Investment</i> website. http://www.theglobeandmail.com/globe-investor/ 2. Click on the “Funds & ETFs” section in the menu bar. 3. Then click on “Fund Lookup” 4. If you know the funds name write it in the white search bar box on the right side of the page. Or you can search for the fund using the “Look Up By” tool on the right-hand side. <p><u>Activity Two: Reading a Mutual Fund Portfolio</u> (20 minutes)</p>	<p>For, As or Of Learning</p> <p>Assessment For Learning (Answer sheet provided)</p> <p>Assessment For Learning (collect journals and review their responses) (Class discussions on answers to questions)</p>



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	<p>Use the <i>Globe and Mail Investment</i> website to “Look Up” the ethical mutual fund “Desjardins Environment”. Activity two uses this mutual fund as an example. When you are done reviewing the different aspects of the mutual fund portfolio with the students have them “Look Up” the mutual fund “Acuity Pooled Conser Asset Alloc” to fill in the blanks in activity two.</p>	<p>Assessment As Learning (Answer sheet provided)</p>
<p><u>During- Processing, Groupings and Definitions</u></p>	<p>C. Have the students read the article “<i>Socially Responsible Investment</i>” and answer the questions on activity sheet three. (30 minutes)</p> <p><u>Activity Three: Socially Responsible Investment (Question Sheet)</u></p> <p>* <u>Investment Journal</u>- When the students are done their worksheets they are to answer the questions at the end of the activity three worksheet in their investment journals. If they do not finish this in class they should do it for homework. (5-10) minutes - <i>If the students have finished the lesson early you can have them get into small groups and share their journal entries with each other.</i></p>	<p>Assessment As Learning (Answer sheet provided)</p> <p>Assessment For Learning (collect journals and review their responses) (Class discussions on answers to questions)</p>
<p>After – Consolidation (Group)</p>	<p>D. The students will complete the placemat activity outlined using the article: <u>Allegations of sexual assault a blow to Barrick and Add Urgency to Miner’s Reforms in Lawless Lands</u> by Geoffrey York of the “Globe and Mail”.</p> <p>If you wish you can use these on-line videos and articles as well or as replacements</p> <ul style="list-style-type: none"> • <u>Congo Gold</u> by 60 minutes http://www.thestar.com/videozone/1014632--the-congo-exploring-a-heart-of-darkness • <u>Canada Mines African Discontent</u> by Linda McQuaig “www.commondreams.org” • <u>Allegations of sexual assault a blow to Barrick and Add Urgency to Miner’s Reforms in Lawless Lands</u> by Geoffrey York “Globe and Mail” <p><u>Activity Four: Socially Responsible Investment (Student Instructions for placemat activity - 30 minutes)</u></p> <p>* <u>Investment Journal</u>- When the students are done their worksheets they are to answer the questions at the end of the activity four worksheet in their investment journals. If they do not finish this in class they should do it for homework. (5-10 minutes) - <i>If the students have finished the lesson early you can have them get into small groups and share their journal entries with each other.</i></p>	<p>Assessment For Learning (presentation in groups or to class) (reviewing the points the student groups put on their placemats)</p> <p>Assessment For Learning (collect journals and review their responses) (Class discussions on answers to questions)</p>
<p><u>Home Activity or Future Classroom Consolidation (Individual)</u></p>	<p>E. The students will be writing a portfolio of an imaginary mutual fund that they have created. They are to market their fund to a SRI . All instructions for the activity are on the activity five handout. They should use their investment journal as a reference for this activity.</p> <p><u>Activity Five: Culminating activity(Student Instructions for culminating activity and rubric)</u></p> <p>You may have the students present these portfolios to the class as well as an extension to this lesson.</p> <ul style="list-style-type: none"> • Or you can do a position paper instead arguing the positives or negatives of purchasing into a mutual fund. 	<p>Assessment Of Learning (rubric)</p>

Work Cited:

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M5V 2S9; Phillip Crawley, Publisher; <http://www.theglobeandmail.com/globe-investor/>

Khan Academy; KhanAcademy; ©2011 Khan Academy™ <http://www.khanacademy.org/video/open-ended-mutual-fund--part-1?playlist=Finance/>

Socially Responsible Investing; Get Smarter About Money website by Investor Education Fund.
http://www.getsmarteraboutmoney.ca/tools_and_calculators/feature-articles/Pages/socially-responsible-investing-an-overview.aspx#; Date:
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Ontario Association for
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