Analyst: Name of Analyst

|  |  |
| --- | --- |
| **FTSE 100 changes** |  |
| 1 Month | -2.90% |
| 3 Month | -2.81% |
| YTD | -4.47% |
| 1 Year | 1.10% |
| **Inflation** |  |
| Month on Month |  |
| Year to Date |  |
| Year on Year |  |
| **Interest rates** |  |
| 1 Year Gilt | 0.8095% |
| *Last month* |  |
| 5 Year Gilt | 1.217% |
| *Last month* |  |
| 10 Year Gilt | 1.466% |
| *Last month* |  |
| **Economic growth** |  |
| GDP (QoQ) | 0.4% |
| *Same last year* | *0.2%* |
| GDP (YoY) | 1.3% |
| *Same last year* | *1.8%* |
| **Trade balance** |  |
| Imports | 54.4bn |
| Exports | 54.5bn |
| Trade Balance | -0.11bn |
| *Same last year* | *-2.3m* |
| **Exchange rates** |  |
| GBP/USD | 1.3271 |
| *Last month* |  |
| GBP/EUR | 1.1286 |
| *Last month* |  |
| GBP/JPY | 148.87 |
| *Last month* |  |

FTSE 100

**7345.61**

52 Week Range

**6866.94 – 7903.50**

**growth/stable/decl**

our opinion

Email: Email of analyst

This report does not have to be long but a summary of key points collected from your review of articles that are written about the UK and World Markets (read articles from FT.com, marketwatch.com etc.)

The data used in the column on the right is mostly taken from tradingeconomics.com (look for United Kingdom). It is important you update the data series every month because that is a summary of how the economy has got on in the last month.

The report content should not be longer than 2 pages, including this page, i.e. 3 pages including everything. Basically, you should have three main sections:

**United Kingdom**

It is best to summarize three main things:

* How the market indices have moved in the last month
* What are likely the main causes for the movement of the index (this should be normally policies by the government, most important are interest rates and inflation rates because they are supposed to influence the market immediately, and then other factors such economic data, new policies, trade war etc.)
* What are likely to happen to the stock market in the next month and near future (this should normally be new policies that may be released, intended to do)

**The World Markets**

Again, the main things you should mention here:

* How did the markets move? (look at the % change of main US, Europe and Japan stock indexes).
* What were the main causes of those movements?
* What are likely to happen?

**Our views**

Now you have the chance to offer your own views on the market movement for the next month or near future based on the consideration of the two sections above. It would be important to note the correlation between UK and World Markets as well. For example, you may say a trade war between US and China is a good/bad news to the UK because … your analysis. At the end, it would be relevant to say something like “We are fairly optimistic about the UK market in the next month or two…”.

Once you have completed the analysis, it is better if you could copy and paste the chart from trading economics for some key indicators because it is always easier to look at the chart than at the data. Three charts that should be included are:

FTSE100 (for 6 month);

Interest rates (1 Year Gilt on the chart or better with also 5, and 10 year Gild yield on the same chart).

Inflation rates (month on month inflation (CPI) (use bars) and year on year inflation (use lines) should be drawn in one chart)

**lincoln studement managed investment fund (lsmif)**

Founded in 2018, the Lincoln Student Managed Investment Fund (LSMIF) is exactly what it says on the tin, a fund which will analyse, determine upon, and purchase shares to create a portfolio. The only difference is we are students. No simulations, just our knowledge and ability vs the real market. The best test of our teachings and learnings.

The fund is set up with a structure similar to any other professionally run fund management company with students running every aspect of the fund, from CEO to analyst. It is designed to give any student involved the best experience of the financial world possible before getting a job.

The fund will be handed down to new students each year as those partake in this fund finish their studying. The fund aims to grow in the future, with more positons available to give the most number of students the chance to partake.

The ultimate goal of the fund is to raise the profile of each student involved to allow for them to get the best experience possible. We, however, set the following objectives to make the fund grow on sustainable basis:

* To generate long-term returns from investments using our stylized investment strategies.
* To raise funds though crowdfunding and donors to help increase the capital base.
* To increase the number of students involved in the fund with expanded capital base.
* To link the fund’s activities with the related programmes and modules’ assessments
* To get more outside sponsors who want to work directly with the fund as well, to further simulate the professional environment.

**Contact details**

Chief Executive Officer: Mr. Cameron Baker, BSc Banking and Finance, University of Lincoln. Email: 16629274@students.lincoln.ac.uk.

Academic Advisor: Dr. Hao Quach. Principal Lecturer/Programme Leader for Banking and Finance programmes. Email: [hquach@lincoln.ac.uk](mailto:hquach@lincoln.ac.uk). Tel: +441522835546

General Enquiries: Email: [LSMIF@lincoln.ac.uk](mailto:LSMIF@lincoln.ac.uk)

**Disclaimer**

This report is for educational purpose only. The views expressed in this report are those of the authors and not necessarily related, by any sense, to those of the University of Lincoln or the Lincoln International Business School. The expressions of opinions in this report are subject to changes without notice. Authors have based this document on information from sources they believe to be reliable but which they have not independently verified. Any recommendations contained in this report are for educational purposes and intended for general/public readers to whom it is distributed. This report is not and should not be construed as an offer or the solicitation of an offer to purchase or subscribe for any investment. This report may not be further distributed in whole or in part for any purpose. No consideration has been given to the particular investment objectives, financial situation or particular needs of any recipient or reader.

**Copyright. Lincoln Student Managed Investment Fund (LSMIF) 2018**, ALL RIGHTS RESERVED. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, on any form or by any means, electronic, mechanical, photocopying recording, or otherwise, without the prior written permission of the Lincoln Student Managed Investment Fund (LSMIF).