

**Lesson 5**

## Matching investment vehicle cards

Print and cut out these cards individually

<b>Stocks</b>	<b>Bonds</b>
<b>Mutual funds</b>	<b>Exchange-traded fund (ETF)</b>
<b>Segregated funds</b>	<b>Hedge funds</b>
<b>Represents a share of ownership in a company</b>	<b>A loan to a company or government that pays interest</b>
<b>Pooled investments managed by professionals</b>	<b>Traded on an exchange; prices change in real time</b>
<b>Offered by insurance companies; includes a guarantee</b>	<b>Private, uses strategies like short selling and leverage</b>

# Lesson 5

Potential for capital growth and dividends	Pays interest and returns principal at maturity
Diversification, higher management fees	Low fees, index-tracking, easy to trade
Insurance + investing, suited for conservative investors	High risk, not available to general public
Hands-on investors wanting flexibility	Conservative investors seeking lower risk
Moderate investors seeking managed portfolios	Cost-conscious investors wanting index exposure
Conservative investors near retirement	High-net-worth or institutional investors

## Lesson 5

### Matching game answer key

Category	Stocks
Definition	Represents a share of ownership in a company
Key feature	Potential for capital growth and dividends
Investor profile	Hands-on investors wanting flexibility

Category	Bonds
Definition	A loan to a company or government that pays interest
Key feature	Pays interest and returns principal at maturity
Investor profile	Conservative investors seeking lower risk

Category	Mutual funds
Definition	Pooled investments managed by professionals
Key feature	Diversification, higher management fees
Investor profile	Moderate investors seeking managed portfolios

Category	ETFs
Definition	Traded on an exchange; prices change in real time
Key feature	Low fees, index-tracking, easy to trade
Investor profile	Cost-conscious investors wanting index exposure

Category	Segregated funds
Definition	Offered by insurance companies; includes a guarantee
Key feature	Insurance + investing, suited for conservative investors
Investor profile	Conservative investors near retirement

Category	Hedge funds
Definition	Private, uses strategies like short selling and leverage
Key feature	High risk, not available to general public
Investor profile	High-net-worth or institutional investors