

InvestYoung Stock Market Challenge Grade 9 IBT

The purpose of this assignment is to educate and expose you to the world of the stock market. You will participate in an online trading simulation operating in real market conditions, including accurate prices on shares of stock traded on real capital markets. You will learn the functions of the capital markets, basics to trading, economic trends, how to manage your money, analyze companies, take calculated risks, develop a keen eye for opportunity, and much more; knowledge and skills learned best through hands-on experience.

Assignment Summary

You will be given a portfolio of \$100,000 (CAD) to buy and sell stocks listed on the major North American markets (e.g. TSE, Nasdaq, NYSE). Your trades will be over a period of four weeks, with the purpose of gaining the greatest possible return in your portfolio.

You will be given an account online through which you will trade and track your portfolio over the course of this assignment. For each trade, you will show a series of calculations and rationale. You will be evaluated on your calculations, rationale, and the presentation of such information.

At the end of the four week period, your account will be liquidated by the sale of all of your holdings. The student with the highest final portfolio value after liquidation will be declared the winner of the competition. Please note that your final ranking, performance, or profitability will **NOT** be a factor in your evaluation.

Additional Notes / Rules

- You will be given your login information by e-mail, with which you will access www.InvestYoung.org
- Over the course of the assignment, you must trade shares of at least ten companies
 - At least two of the total of ten companies must traded on an US exchange
 - You must make at least two trades per week (buy or sell)
- Not more than \$50,000 of your portfolio may be held as cash at any time
- For every trade you make, you are required to complete a Trading Form to record trading data
 - Trading Forms will be collected every Monday for the previous week's trades
- Familiarize yourself with the principles, vocabulary, and concepts used in the stock market through the online resources recommended at www.InvestYoung.org
 - Refer to the User Guide provided online for further instructions on the operations of the online trading system
 - Questions or comments can be forwarded to gr9ibt@investyoung.org
- A Final Reflection (one page) will be submitted at the end of the competition, answering the following:
 - What would you do differently to improve your evaluation and portfolio if you had the same assignment? (Use specific examples from your portfolio)
 - How would your experience in this assignment be applicable in "real life"?
 - Are you considering a future career in finance?
 - What are the skills and knowledge required for a career in finance?
 - How have these skills been highlighted through the competition?

Important Dates

May 3rd - Start Competition
May 10th - Hand in first week Trading Forms
May 17th - Hand in second week Trading Forms
May 24th - Hand in third week Trading Forms
May 28th - Competition ends
May 31st - Hand in fourth week Trading Forms & Final Reflection