

Stock Market Game, 2010

Purpose

Participants in the SIFMA Foundation Stock Market Game develop and manage an investment portfolio. The Stock Market Game is conducted via the Internet and allows DECA members to test their skills against other DECA members in an online competition. Each participating team manages all aspects of the portfolio including stock selection, buying and selling. The goal of the competition is to increase the value of the beginning portfolio.

During the course of the Stock Market Game, participants will

- ◆ develop investment strategies based on expectations of growth, diversification and stability
- ◆ attempt to avoid the pitfalls of market decline, mergers and overextension

Eligibility

1. Only high school members of DECA Inc. are eligible to participate.
2. Eligibility to attend the international conference is determined by the state/provincial associations, based on their policies. Finalists should consult with their state/provincial advisor for eligibility guidelines.
3. Members qualifying for participation at ICDC must wear a DECA blazer during the competitive session.

Procedure

- This event consists of a **written document** describing the investment project and the **oral presentation**.
- Each event entry will be composed of **one to three** members. A team member cannot be on more than one team at a time. No additional team members may be added once a team has registered.
- The Stock Market Game will contain one (1) ICDC qualifying event to take place September 8–December 18, 2009.
- Each team must have completed a minimum of three (3) executed stock purchases during the first seven weeks of the game (deadline is 5 p.m. PDT, October 23, 2009). In addition, each team must hold three (3) different stocks by the end of the game.
- Portfolios will be available for retrieval until February 1, 2010. After February 1, portfolios **will not** be accessible.
- The body of the written entry must be limited to **11 numbered pages**, not including the title page and the table of contents.
- The **Written Event Statement of Assurances** must be signed and submitted with the entry. Do not include it in the page numbering.
- The participant will bring all visual aids to the event briefing. Only approved visual aids may be used during the presentation.
- The oral presentation may be a maximum of 15 minutes in length. The first 10 minutes will include a presentation of and defense for the investment project, focusing on the effectiveness of public speaking and presentation skills and how well the participants respond to questions that the judge may ask during the 5 minutes following the presentation.
- The top 25 teams from each region will qualify to present their portfolio at ICDC. Students competing at ICDC in the Stock Market Game may not compete in another ICDC event.
- For complete Stock Market Game event guidelines and procedures, go to <http://deca.smgww.org>.

Skills Assessed

The participants will demonstrate skills described by the performance indicators for general marketing as well as learn/understand the importance of

- communications skills—the ability to exchange information and ideas with others through writing, speaking, reading or listening
- analytical skills—the ability to derive facts from data, findings from facts, conclusions from findings and recommendations from conclusions
- critical thinking/problem-solving skills
- production skills—the ability to take a concept from an idea and make it real
- priorities/time management—the ability to determine priorities and manage time commitments

Format Guidelines for the Written Entry

The written entry must follow these specifications. Refer also to the Competitive Event Checklist and the Written Entry Evaluation Form. A Written Event Statement of Assurances must be signed and submitted with the entry. Do not include it in the page numbering.

Title page. The first page of the written entry is the title page. It must include in any order, but is not limited to, the following:

- STOCK MARKET GAME
- Name of DECA chapter
- Name of high school
- School address
- City, State/Province, ZIP/Postal Code
- Name of participant
- Date

The title page will *not* be numbered.

Table of contents. The table of contents should follow the title page. All activities or original research described in this entry must take place during this school year or the timeline specified in the Event Guidelines. The table of contents may be single-spaced and may be one or more pages long. The table of contents page(s) will not be numbered.

Body of the written entry. The body of the written entry begins with Section I, Executive Summary, and continues in the sequence outlined here. The first page of the body is numbered 1 and all following pages are numbered in sequence. Page numbers continue through the bibliography (required) and the appendix (optional).

The participants will prepare a written document, which is limited to 11 pages (not including the title page).

Follow this outline when you write your entry. Points for each section are shown on the Presentation Evaluation Form. Each section must be titled, including the bibliography and the appendix.

- I. EXECUTIVE SUMMARY
 - One-page description of the project
- II. ANALYSIS OF PORTFOLIO PERFORMANCE
- III. RATIONALE
 - A. Explanation of research conducted prior to selection of stocks and/or funds
 - B. Strategy used to diversify investment portfolio
 - C. Description of how selected stocks and/or funds fit strategy
- IV. CONCLUSIONS AND FINDINGS
 - A. Explanation of strategy effectiveness
 - B. Proposed changes in strategy for future investments
- V. CHARTS/DIAGRAMS OF PORTFOLIO PERFORMANCE
- VI. BIBLIOGRAPHY
- VII. APPENDIX
 - An appendix is optional. Include in an appendix any exhibits appropriate to the written entry but not important enough to include in the body. These might include sample questionnaires used, letters sent and received, general background data, minutes of meetings, etc.

Checklist Standards

In addition to following the outline above, when preparing your written entry you must observe all of the following rules. The purpose of these rules is to make the competition as fair as possible among participants. Refer to the Written Entry Checklist.

1. The Written Event Statement of Assurances must be signed and submitted with the entry or the entry will receive 15 penalty points.
2. The entry must be submitted in an official DECA written event folio. Folios are available from DECA IMAGES (WEF000). No markings, tape or other material should be attached to the folio. One photocopy or the original typed document must be submitted. Participants may keep a copy for use in the presentation.
3. Sheet protectors may not be used.

(Continued on next page)

4. The body of the written entry must be limited to 11 numbered pages, not including the title page and table of contents page.
5. The pages must be numbered in sequence, starting with the executive summary. Do not use separate sheets between sections or as title pages for sections.
6. Major content of the written entry must be at least double-spaced (not space-and-a-half). The title page, table of contents, executive summary, footnotes, long quotes (more than three typed lines), material in tables, figures, exhibits, lists, headings, sample letters, forms and financial reports may be single-spaced.
7. Entry must be typed/word processed. Handwritten corrections will be penalized. Charts and graphs may be handwritten. (Judges will be instructed to ignore attempts to achieve a competitive advantage due to the quality of word-processing equipment available.)
8. All material must be shown on 8¹/₂-inch x 11-inch paper. Pages may not fold out to a larger size. No extraneous information may be attached to the pages and tabs may not be used.
9. Decorative artwork, pictures, illustrations and desktop publishing techniques may be used throughout the manual, including the title page and table of contents. Photographs in the manual must be scanned and placed as digital files.
10. The body of the written entry must follow the sequence outlined. Additional subsections are permitted.
11. The table of contents should follow the title page.

Presentation Guidelines

- The participants will present to the judge in a 15 minute presentation worth 100 points (See Presentation Judging).
- The presentation begins immediately after the introduction of the participant to the judge by the adult assistant.
- The participant will spend not more than 10 minutes (after introductions) setting up visual aids and presenting the prospectus to the judge. The participant may bring a copy of the prospectus or note cards pertaining to the prospectus and use as reference during the presentation.
- The judge will spend the remaining 5 minutes questioning the participant. (See Presentation Evaluation Form.)
- The participants may use as visual aids only display material mounted on not more than three (3) standard-sized posters not to exceed 22¹/₂ inches by 30¹/₂ inches each and/or one (1) standard-sized presentation display board not to exceed 36¹/₂ inches by 48¹/₂ inches. Participants may use both sides of the posters, but all attachments must fit within the poster dimensions. Only visual aids that can be easily carried to the presentation by the actual participants will be permitted, and the participants themselves must set up the visuals. Participants are allowed to make use of a desktop flip chart presentation easel 12 inches by 10 inches (dimensions of the page). Participants are also allowed to make use of a personal laptop computer and/or a hand-held digital organizer they provide. No set-up time will be allowed. No sound may be used. If participants use a personal computer, they must bring their own battery power pack, as electrical power will NOT be supplied. No other materials may be brought to or used during the presentation by the participants.
- No materials of any kind may be passed to the judge.
- If any of these rules are violated, the adult assistant must be notified by the judge.

Presentation Judging

During the first 10 minutes of the presentation (after introductions), the participants will set up any visual aids and present and defend the written summary. Set-up time and presentation time are included in the 10 minutes. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

During the final 5 minutes, you may question the participants about the presentation. To ensure fairness, you must ask each participant or group of participants the same questions. You should prepare these questions after you have read each written summary but before the presentation begins. After asking the questions, you may ask additional questions that seem appropriate, based on your notes, which you may refer to during the presentation, or the presentation itself. Each participant must respond to at least one question.

Familiarize yourself with all of the guidelines before starting to evaluate the presentation.

After the questioning period, please thank the participants. Then complete the Presentation Evaluation Form, making sure to record a score for all categories. The maximum score for the evaluation is 100 points. It may help to go through several entries before actually starting to score the entries. Take notes on a separate sheet of paper if you wish to ask the participant about specific areas of the written summary during the presentation.

Stock Market Game, 2010

Participant(s): _____

Presentation Evaluation Form

I.D. Number: _____

	Exceeds Expectations	Meets Expectations	Below Expectations	Little/No Value	Judged Score
1. The written and oral presentations show evidence of a realistic knowledge of investment trends and financial markets	6-5	4	3-2	1-0	_____
2. The stock portfolio exhibits diversity across sectors of the economy	6-5	4	3-2	1-0	_____
3. The written and oral presentations demonstrate an understanding of investment objectives	14-13	12 -10	9-5	4-0	_____
4. The written and oral presentations demonstrate correct use of investment terminology.....	6-5	4	3-2	1-0	_____
5. The presentations demonstrate research beyond the stock's performance history — i.e., the investment decisions were based on knowledge of the company's underlying business performance or plans	14-13	12 -10	9-5	4-0	_____
6. The written and oral presentations explain the effectiveness of the strategy	13	12 -10	9-5	4-0	_____
7. The written and oral presentations explain changes in strategy for future investments	13	12 -10	9-5	4-0	_____
8. The written plan shows creativity in design and execution	6-5	4	3-2	1-0	_____
9. The oral presentation proceeds in a logical, organized manner and is appropriate to the investment industry.....	6-5	4	3-2	1-0	_____
10. All members of the team participating in the oral presentation contributed equally	6-5	4	3-2	1-0	_____
11. Participants answered the judge's questions knowledgeably and professionally	6-5	4	3-2	1-0	_____
12. The written entry exhibited neatness, proper grammar and spelling	4	3	2	1-0	_____

Total Possible Points: 100

Judge's Total Score: _____

LESS PENALTY POINTS: _____

TOTAL SCORE: _____

Judge: A B C D E F G H (circle one)