

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 knowledge and 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



EVENT OVERVIEW



1 to 3 PARTICIPANTS



ONLINE SIMULATION



PAGES ALLOWED



PRESENTATION TIME

- 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 from September 8 through December 12, 2014.
- Each team must have completed a minimum of three (3) executed stock purchases during the first seven weeks of the game (deadline is close of trading, October 24, 2014). In addition, each team must hold three (3) different stocks at the end of the game.
- Portfolios will be available for retrieval until February 1, 2015. 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 may 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.
- Eligibility to attend the international conference is determined by the chartered associations, based on their policies. Finalists should consult with their chartered association advisor for eligibility guidelines.
- For complete Stock Market Game event guidelines and procedures, go to <http://deca.smgww.org>.



KNOWLEDGE AND SKILLS DEVELOPED

Participants will demonstrate knowledge and skills needed to address the components of the project as described in the content outline and evaluation forms.

Participants will also develop many 21st century skills, in the following categories, desired by today's employers:

- | | |
|---|------------------------------------|
| ■ Communication and Collaboration | ■ Creativity and Innovation |
| ■ Critical Thinking and Problem Solving | ■ Flexibility and Adaptability |
| ■ Information Literacy | ■ Initiative and Self-direction |
| ■ Leadership and Responsibility | ■ Media Literacy |
| ■ Productivity and Accountability | ■ Social and Cross-cultural Skills |

A crosswalk is available at www.deca.org that shows which 21st century skills are developed by participating in each competitive event.

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Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events. Crosswalks are available at www.deca.org that show which common core standards are supported by participating in each competitive event.



FORMAT GUIDELINES FOR THE WRITTEN ENTRY

The written entry must follow these specifications. Refer also to the Written Entry 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 participants
- 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 between the immediate past International Career Development Conference and the upcoming Chartered Association Career Development Conference. 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 provided, when preparing your written entry you must observe all of the following rules. The purpose of these rules is to make competition as fair as possible among the participant teams. Refer to the Written Entry Checklist on page 54 for a complete list of standards.



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 the following items during the oral presentation:
 - not more than three (3) standard-sized posters not to exceed 22¹/₂ inches by 30¹/₂ inches each. Participants may use both sides of the posters, but all attachments must fit within the poster dimensions.
 - one (1) standard-sized presentation display board not to exceed 36¹/₂ inches by 48¹/₂ inches.
 - one (1) desktop flip chart presentation easel 12 inches by 10 inches (dimensions of the page).
 - one (1) personal laptop computer.
 - cell phones/smartphones, iPods/MP3 players, iPads/tablets or any type of a hand-held, information sharing device will be allowed in written events *if* applicable to the presentation.
 - sound, as long as the volume is kept at a conversational level.
- 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. No set-up time will be allowed. Participants must furnish their own materials and equipment. No electrical power or Internet connection will be supplied.
- Materials appropriate to the situation may be handed to or left with judges in all competitive events. Items of monetary value may be handed to but may not be left with judges. Items such as flyers, brochures, pamphlets and business cards may be handed to or left with the judge. No food or drinks allowed.
- 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, 2015

**WRITTEN ENTRY AND ORAL PRESENTATION
EVALUATION FORM**

Participant: _____

Participant: _____

Participant: _____

I.D. Number: _____

		Little/No Value	Below Expectations	Meets Expectations	Exceeds Expectations	Judged Score
1.	The written and oral presentations show evidence of a realistic knowledge of investment trends and financial markets	0-1	2-3	4	5-6	
2.	The stock portfolio exhibits diversity across sectors of the economy	0-1	2-3	4	5-6	
3.	The written and oral presentations demonstrate an understanding of investment objectives	0-1-2-3-4	5-6-7-8-9	10-12	13-14	
4.	The written and oral presentations demonstrate correct use of investment terminology	0-1	2-3	4	5-6	
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	0-1-2-3-4	5-6-7-8-9	10-12	13-14	
6.	The written and oral presentations explain the effectiveness of the strategy	0-1-2-3-4	5-6-7-8-9	10-12	13	
7.	The written and oral presentations explain changes in strategy for future investments	0-1-2-3-4	5-6-7-8-9	10-12	13	
8.	The written plan shows creativity in design and execution	0-1	2-3	4	5-6	
9.	The oral presentation proceeds in a logical, organized manner and is appropriate to the investment industry	0-1	2-3	4	5-6	
10.	All members of the team participating in the oral presentation contributed equally	0-1	2-3	4	5-6	
11.	Participants answered the judge's questions knowledgeably and professionally	0-1	2-3	4	5-6	
12.	The written entry exhibited neatness, proper grammar and spelling	0-1	2	3	4	
Total Possible Points: 100					Judge's Total Score:	
						LESS PENALTY POINTS:
						TOTAL SCORE:

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