



STOCK MARKET GAME

STOCK MARKET GAME SMG

Participants in the SIFMA Foundation **Stock Market Game** develop and manage a virtual investment portfolio of stocks, bonds, and mutual funds. 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 asset selection, buying and selling. The goal of the competition is to increase the value of the 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

ONLINE EVENT OVERVIEW

It is the responsibility of the advisor and participating teams to familiarize themselves with the *Rules of The Stock Market Game*. Rules are accessible through a link on the home pages of the team portfolio and in the Teacher Support Center.

- The Stock Market Game will contain one (1) ICDC qualifying event to take place from September 5 through December 15, 2017.
- The last day for making transactions in Stock Market Game team portfolios is the day before the end of the session: December 14, 2017.
- Teams may not invest more than 33% of their total equity multiplied by 1.5 in any one company. If a stock in a team portfolio increases in value and places the investment beyond 33% of their total equity multiplied by 1.5, they will be able to retain their shares but unable to purchase additional shares of that stock. This rule is the Maximum Equity Rule. The Stock Market Game system will automatically enforce this rule.
- Each team must have at least one successfully completed trade by the close of market (4PM ET), Friday, October 27, 2017. Portfolios must contain a minimum of three different types (a stock investment, a bond investment, and a mutual fund investment) by the last trade date, which is Thursday, December 14, 2017, at 4 PM ET, in order to qualify for ICDC competition. Teams may change the companies, bonds, and mutual funds they are invested in but must maintain a minimum of three different investment types. Teams that do not follow this rule will be disqualified.
- Portfolios will be available for retrieval until February 2, 2018. After February 2, 2018, portfolios **will not** be accessible.
- Rankings will be based on the percentage growth above or below the value of the S&P 500.
- 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. Only original team members may compete at ICDC. No substitutions will be allowed to the original team.
- All teams and students must be registered with DECA in order to participate. Otherwise they will be disqualified.
- All registered advisors must be a teacher. Students are not allowed to be listed as the advisor. The teams will be disqualified if it is not set up correctly.

ICDC QUALIFIER EVENT OVERVIEW

In addition to the general rules of the Stock Market Game, DECA advisors and their teams should be aware of the following:

- 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** of the DECA chapter. 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 body of the written entry must be limited to **11 numbered pages**, including the appendix (if an appendix is attached), but excluding the title page and the table of contents.

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

Many Common Core Standards for Mathematics and English Language Arts & Literacy are supported by participation in DECA's competitive events.

Crosswalks that show which 21st Century Skills are developed and which common core standards are supported by participating in each competitive event are available at deca.org.

- The **Written Event Statement of Assurances and Academic Integrity** 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, including time for judge's questions.
- The judge will evaluate the presentation of and defense for the investment project, focusing on the effectiveness of public speaking and presentation skills.
- 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, procedures and ICDC information, go to <http://deca.smgww.org>.

WRITTEN ENTRY GUIDELINES

The written entry must follow these specifications. Refer also to the Written Entry Checklist and the Written Entry Evaluation Form.

WRITTEN EVENT STATEMENT OF ASSURANCES AND ACADEMIC INTEGRITY. This 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 high school
- School address
- City, State/Province, ZIP/Postal Code
- Names of participants
- Date

Title page will **not** be numbered.

TABLE OF CONTENTS. The table of contents should follow the title page. 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).

This outline must be followed. 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.



1 to 3
PARTICIPANTS



ONLINE
SIMULATION



11
PAGES
ALLOWED



15
PRESENTATION
TIME

WRITTEN ENTRY CHECKLIST

In addition to Written Entry Guidelines, participants must observe all of the standards on the Written Entry Checklist on page 52. These standards are designed to make competition as fair as possible.

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 participants to the judge by the adult assistant.
- Each participant may bring a copy of the written entry or note cards pertaining to the written entry and use as reference during the presentation.
- If time remains, the judge may ask questions pertaining to the project.
- 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

Participants will make a 15-minute presentation to you. As the judge, you are to assume the role of a manager. You may refer to the written entry, or to your notes, during the presentation.

At the beginning of the presentation (after introductions), the participants will present the investment project. Allow the participants to complete this portion without interruption, unless you are asked to respond. Each participant must take part in the presentation.

If time remains, you may ask questions that seem appropriate, based on your notes or on the written entry itself (to which you may refer during the presentation).

At the conclusion of the presentation, 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.



STOCK MARKET GAME

STOCK MARKET GAME SMG

WRITTEN ENTRY AND PRESENTATION EVALUATION FORM

	LITTLE/ NO VALUE	BELOW EXPECTATIONS	MEETS EXPECTATIONS	EXCEEDS EXPECTATIONS	JUDGED SCORE
1. Executive Summary: One-page description of the project.	0-1-2-3	4-5-6	7-8	9-10	
2. The written and oral presentations show evidence of a realistic knowledge of investment trends and financial markets.	0-1	2-3	4	5-6	
3. The stock portfolio exhibits diversity across sectors of the economy.	0-1	2-3	4	5-6	
4. The written and oral presentations demonstrate an understanding of investment objectives.	0-1-2-3-4	5-6-7-8-9	10-11-12	13-14	
5. The written and oral presentations demonstrate correct use of investment terminology.	0-1	2-3	4	5-6	
6. 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	10-11-12	13-14	
7. The written and oral presentations explain the effectiveness of the strategy.	0-1-2-3-4	5-6-7-8-9	10-11-12	13	
8. The written and oral presentations explain changes in strategy for future investments.	0-1-2-3-4	5-6-7-8-9	10-11-12	13	
9. The written plan shows creativity in design and execution.	0	1	2	3	
10. The oral presentation proceeds in a logical, organized manner and is appropriate to the investment industry.	0-1	2-3	4	5-6	
11. All members of the team participating in the oral presentation contributed equally.	0-1	2-3	4	5-6	
12. The written entry exhibited neatness, proper grammar and spelling.	0	1	2	3	

TOTAL POINTS (100)	
LESS PENALTY POINTS	
TOTAL SCORE	

JUDGE _____