

(V09) Financial Portfolio Management Team

Description

Teams (2-4 members) will enter an investment simulation using an online platform provided by a BPA partner. The simulation will provide the students with \$100,000 initially, to be used to invest in stocks, mutual funds, and/or bonds. Awards will be presented at the National Leadership Conference.

Eligibility

- Any Business Professionals of America student member may enter this event.
- There are no restrictions on the number of entries per chapter or per state.

Contest Overview

Round One: All registered teams will participate in a virtual stock market challenge.

Teams manage their portfolios throughout the contest with the following requirements:

- Teams can buy any investment allowed through the NYSE and NASDAQ markets, including stocks, mutual funds, ETFs, and bonds.
- Teams will be limited on any one investment to 20% of their portfolio, thus mandating a diversification strategy.
- Teams will be allowed to buy on margin up to 100% of their initial cash balance, at an interest rate to be determined by current market factors at the inception of the contest.
- Teams will receive interest on any cash balance maintained, at a rate to be determined by current market factors at the inception of the contest.
- Teams will buy and sell as they wish, with each transaction subject to a pre-determined fee subtracted from their cash balance (online platform will determine the fee).
- Teams must make a minimum of five transactions to be eligible for placement.

The top twenty (20) teams, in terms of portfolio value, will be invited to participate in Round Two.

Additional information (team credentials and tutorials) regarding Round One will be sent to all registered teams by December 8, 2024.

Round Two: The top twenty (20) teams from Round One will be invited to create and present a virtual presentation of no longer than ten (10) minutes on their strategies for success and challenges faced.

Suggested strategies include, but not limited to:

- Analysis of day-to-day stock trends and historic performance
- Research on companies past news releases
- Research on companies' development of products, patents, potential buyouts, etc.-
- Research on historic and future quarterly earnings reports
- Research on market initial public offerings (IPOs)
- Analysis of financial statements, including financial ratios
- Industry research and analysis

Event Registration

- Advisors register members for the event using the Membership Registration System, accessible at <https://register.bpa.org>.
- Click on the “Conferences” tab and then select the “2025 National Virtual Events”.
- Event registration can be purchased with your original invoice or with a new invoice after member registration.
- The registration deadline is no later than 5:00 p.m. Eastern Time, on December 1, 2024.
- Members participating in competition must be registered for the event prior to the submission deadline to be eligible.

Entry Fee

There will be a \$20 fee for each team entry (*invoiced during event registration*).

Competencies

- Calculate investment amounts given current prices and investment restrictions
- Research and analyze various investment options
- Manage an online fund
- Determine timing of buying and selling investments using various market and economic factors
- Calculate return on investments
- Analyze cash and investments to maximize return
- Prepare a presentation using a presentation software
- Prepare reports using Excel
- Present investment strategies

Specifications

- Compete in the virtual stock market challenge, powered by StockTrak.
- The member shall design a computer-generated multimedia presentation on the assigned topic.
- The member is to make effective use of current multimedia technology in the presentation (e.g., sound, movement, digital video, etc.).
- The length of setup will be no more than three (3) minutes.
- The length of the presentation will be no less than seven (7) minutes and no more than ten (10) minutes, followed by no more than five (5) minutes of judges’ questions.
- All text/graphic materials must follow the organization’s Graphic Standards and make proper use of the logo and/or organization’s name. (Refer to the Graphic Standards in the *Style & Reference Manual*)
- Teams will be assigned to sections prior to their preliminary presentation.
- For teams who qualify, the teams’ advisors will be contacted to reserve a time for a videoconference presentation before a panel of judges. Email confirmation will be sent to those teams eligible to reserve a presentation time. The dates and times for presentation reservations will be announced via email notification.
- The top teams with the highest cumulative presentation scores will be invited to attend the National Leadership Conference to be recognized for their outstanding efforts and to participate in the National Showcase. See <https://bpa.org/nlc/virtual-competitions-and-nlc-national-showcase/> for more information.

- It is the policy of Business Professionals of America to comply with state and federal copyright law. Federal law pertaining to copyright, as contained within the United States Code, is available at <https://www.copyright.gov/title17/title17.pdf>. The *Style & Reference Manual* contains guidelines for Copyright and Fair Use. Participant(s) will be *disqualified* for violations of the guidelines.
- Business Professionals of America grants permission for the use of the copyrighted logo and tagline.

Method of evaluation

Virtual Stock Market Challenge (virtual hands-on)
Presentation Judges' Rating Sheets

Length of event

Virtual Stock Market Challenge (virtual hands-on) - December 15, 2024 - January 31, 2025
Presentation - No more than three (3) minutes setup
Presentation - No more than ten (10) minutes presentation time
Presentation - No more than five (5) minutes judges' questions

This event is sponsored by:



(V09) Financial Portfolio Investment Team

Judge Number _____

Team Number _____

Presentation Scoring Rubric

Items to Evaluate	Below Average	Average	Good	Excellent	Points Awarded
Introduction and conclusion	1-5	6-10	11-15	16-20	
Investment strategy is explained	1-5	6-10	11-15	16-20	
Ability to use technical terms, along with appropriate explanations	1-5	6-10	11-15	16-20	
Investment strategy and research demonstrated financial understanding and knowledge	1-5	6-10	11-15	16-20	
Typography and graphics used effectively	1-5	6-10	11-15	16-20	
Professionalism of presentation (voice quality, diction, eye contact)	1-5	6-10	11-15	16-20	
Presentation achieved desired results	1-5	6-10	11-15	16-20	
Answers to judges' questions	1-5	6-10	11-15	16-20	
All points or none are awarded per item below.					
Setup lasted no more than three (3) minutes				5	
Presentation was no less than seven (7) minutes and lasted no more than ten (10) minutes				10	
At least two original team members in attendance at time of presentation				10	
TOTAL PRESENTATION POINTS (185 points maximum)					

Props and/or additional items shall not be used as a basis for scoring.

PRESENTATION WILL BE STOPPED AT TEN (10) MINUTES

TOTAL MAXIMUM POINTS = 185