

Financial Securities Portfolio Competition 2012

Teacher information

What is the Financial Securities Portfolio Competition?

The student will design an investment portfolio to meet the client's needs. The competition is not about how well the portfolios do financially but about how well the students met the needs of their clients and accommodated their risk/reward tolerance factor. It is also about what they have learned.

What can you win?

Students can win a cash prize.

1st place: \$750

2nd place: \$500

3rd place: \$300

Honorable Mention: \$200

Award of Merit: \$100

Who can participate?

High school students enrolled in grades 11 and 12. This competition is perfect as a cumulative activity and well-suited to students enrolled in accounting, economics and IDC4U—Financial Securities.

How do you win?

The submissions will be judged on several criteria:

- Client profile and investment strategy
- Analysis and recommendations including economic factors and market events
- Asset mix to meet the clients' short, medium and long-term goals including risk tolerance
- Key learnings from the project

Remember: portfolio value is not a factor when judging the submissions.

How do you participate?

Email callum@investored.ca to register your class's participation in the competition. See list of teaching resources (on page 2) to help you teach the various components of the competition.

How and when do you submit the portfolios?

A maximum of five portfolios can be submitted per section. Submissions must be received **no later than June 1, 2012**.

Send portfolios to:

Financial Securities Portfolio Competition
Investor Education Fund
20 Queen St. W., Box 32
19th floor Mailroom
Toronto, ON M5H 3S8

Questions: callum@investored.ca

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Teaching Resources

Investor Education Fund (IEF) has many resources to help you meet curriculum expectations and teach investing. The Financial Securities Investment Portfolio competition was developed based on the Activity 7 – Investment Portfolio project found in the IEF’s teacher resource Taking Stock In Your Future Senior Guide. Supplementary activities/lesson plans are also listed for your information.

Resources are available online at <http://www.getsmarteraboutmoney.ca/education-programs/for-teachers/curriculum-tools/taking-stock-in-your-future/Pages/default.aspx>

| Outline | Est. Classes |
|--|--|
| Preparatory Activity, if needed <input type="checkbox"/> Financial Terms Activity <ul style="list-style-type: none"> o Taking Stock Senior, Pre-test A Financial Terms, pg 23 o Taking Stock Intermediate, Activity 11, pg 150-151 | 1 or 2 |
| Client Profile Activity <input type="checkbox"/> Taking Stock Senior Activity 7, Creating an Investment Portfolio <ul style="list-style-type: none"> o Taking Stock Intermediate Activity 13, pg 173 & 174 | 1 |
| Asset Allocation Activities <input type="checkbox"/> Taking Stock Senior Activity 7, Creating an Investment Portfolio <ul style="list-style-type: none"> o Taking Stock Senior Activity 4, How a Stock Market Works, pg 73-92 o Taking Stock Senior Activity 5, Risks and Safeguards in Stock Trading, pg 93-102 o Fair Play Lesson 1 (1.4), Characteristics of Various Types of Securities Scavenger Hunt | 4 to 5 |
| Investment Decision Activities & Portfolio Records & Monitoring <input type="checkbox"/> Taking Stock Senior Activity 7, Creating an Investment Portfolio <ul style="list-style-type: none"> o Taking Stock Senior Activity 6, Analysing Stocks as Investments, pg 106-116 o Taking Stock Intermediate Activity 13, Choosing Stocks from the TSX, pg 175-177 o Fair Play Lesson 1, Financial Disclosure & Financial Statements o Fair Play Lesson 2, Caveat Emptor (Buyer Beware), pg 15-34 o Fair Play Lesson 3, Avoiding Frauds & Scams, pg 35-50 o Taking Stock Intermediate Activity 15, Assessing Your Portfolio, pg 187-191 | 4 to 5 Portfolio tracking for 6 weeks |
| Self-Reflection | 1 or 2 |
| Portfolio Project Completed <ul style="list-style-type: none"> o SUBMIT 5 INDIVIDUAL PORTFOLIOS/CLASS TO INVESTOR EDUCATION FUND | June 1, 2012 |

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