

## **(V09) Financial Portfolio Management Team (ML | S | PS)**

### **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 \$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 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 regarding Round One will be sent to all registered teams after the November 15, 2021 registration deadline.**

**Round Two:** The top twenty (20) teams from Round One will be invited to create and present a virtual presentation (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 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>.
- The event can be added to your invoice using step 4, “Virtual Event Registration.” Enter the name of each student into the “notes” field.
- Event registration can be purchased with your original invoice or with a new invoice after member registration.
- Registration deadline is no later than 11:59 p.m. Eastern Time, on November 15, 2021.
- Members participating in competition must be registered for the event prior to 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 set-up 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](#).)
- Members will be assigned to sections prior to their preliminary presentation.
- For members who qualify, members’ advisors will be contacted to reserve a time for a videoconference presentation before a panel of judges. E-mail confirmation will be sent to those members eligible to reserve a presentation time. The dates and times for presentation reservations will be announced via e-mail notification.
- The top teams with the highest cumulative technical and 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 <http://www.bpa.org/nlc/nationalshowcase> 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.
- National 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 Sheet

**Length of event**

Virtual Stock Market Challenge (virtual hands-on) – November 16, 2020 – January 15, 2021  
Presentation - No more than three (3) minutes set-up  
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 (ML | S | PS)**

Judge Number \_\_\_\_\_

Team Number \_\_\_\_\_

**Presentation Scoring Rubric**

Member Violated the Copyright and/or Fair Use Guidelines	<input type="checkbox"/> Yes <i>(Disqualification)</i>	<input type="checkbox"/> No
If yes, please stop scoring and provide a brief reason for the <i>disqualification</i> below:		
Member followed topic	<input type="checkbox"/> Yes	<input type="checkbox"/> No <i>(Disqualification)</i>

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	
<b>TOTAL PRESENTATION POINTS (160 points maximum)</b>					

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

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Judge Number \_\_\_\_\_

Team Number \_\_\_\_\_

**Specification Scoring Rubric**

<b>SPECIFICATION POINTS:</b> All points or none per item are awarded by the proctor per member, <i>not</i> per judge.		<b>Points Awarded</b>
Set-up lasted no more than three (3) minutes – 5 points	10	
Presentation was no less than seven (7) minutes and lasted no more than ten (10) minutes – 5 points		
<b>TOTAL SPECIFICATION POINTS (10 points maximum)</b>		

**TOTAL MAXIMUM POINTS =170**

**PRESENTATION WILL BE STOPPED AT TEN (10) MINUTES**