

FLA Presents: UCI STOCK MARKET COMPETITION 2018-2019 Syllabus

Contact Information

Founder and ASUCI Business Senator, Julie Lim

Phone: (714) 702-9996

Email: juliehl@uci.edu

Associate Director of CIWM, Lee Anne Maki

Phone: (949) 824-2675

Email: lmaki@uci.edu

Office: SB1 3401

About Financial Literacy Association (FLA)



The Financial Literacy Association's (FLA) mission is to provide UCI students with the resources to manage their personal finances and increase their financial literacy. FLA hosts bi-weekly meetings on the UCI campus that is open to the general public. FLA's largest program is UCI's campus-wide annual Stock Market Competition. *Bi-Weekly Tuesday Meetings from 7:30-8:30pm*

Founder Bio



Julie Lim's interests include project management, marketing, and entrepreneurship. Her goal is to increase people's personal finance and to promote business skills across all majors. Her position as ASUCI Business Senator calls to serve the Business Undergraduate Department. After hearing the students' desire for more applicable experiences and the non business majors' desire to have more opportunities to get involved in business affairs, Ms. Lim conceived the idea of a campus-wide Stock Market Competition. The Center for Investment and Wealth Management (CIWM) has greatly supported Ms. Lim in her endeavor by providing staff, funds, and other resources. This competition could not have been accomplished without CIWM.

Purpose of the Competition

The primary purpose for the Stock Market Competition is to help participants increase their financial literacy and be prepared to manage their (future) wealth by gaining knowledge about investments and the stock market. The competition is to give participants a hands-on experience with investing. This Stock Market Competition is not focused on return on investment since the competition only lasts 4 months and FLA advocates for long-term investment rather than short-term gains. The focus will be on strategy and knowledge growth. This competition is highly encouraged among those who have no prior experience or knowledge about investing since workshops, office hours, online tutorials, and other educational material for beginners are provided.

This is primarily a learning experience. Although this is a competition, knowledge growth matters the most.

Why Invest?

The primary benefit of stock trading is the ability to **make your money make money**. When done right, stock trading is one of the most effective ways to make a profit and build wealth. When an investor buys a stock at one price and then sells it at a higher price, the investor has made a profit. In the stock market, investors have an opportunity to make large profits in a relatively short period of time. Additionally, some stocks pay dividends, providing investors with a regular stream of cash.

The other key benefit of stock trading is the chance to **beat inflation**. If you just let your money sit in a saving account, the ongoing increase in the prices of goods and services will decrease the value of your money over time. For this reason, it is crucial that your money grows at least as quickly as inflation does. Since stock trading can provide sizable returns, it is a great way to ensure that your money beats inflation. This is the primary method for saving for retirement. Investing can also be a way to make extra money.

Expected Weekly Time Commitment

In real practice, stock traders range from investing in one stock to trading many stocks every day. It is up to the user, but a minimum of 30 minutes is suggested per week.

Weekly Suggestions:

- Taking Stock Trak Assignments
- Researching economic data and trends

Stock Trak

Stock Trak is the provider of the virtual stock market website platform. Participants receive \$100,000 in a virtual brokerage account. They use this cash to manage a portfolio for the duration of the competition with Stock Trak's stock simulation. This portfolio can include stocks, options, futures, bonds, mutual funds, currencies and other securities from 50 global exchanges. All participants must register with Stock Trak to compete. There will be a \$10 fee for each transaction made. (Registration is free)

1.Trading Parameters

Account Currency	USD
Beginning Cash	\$100,000.00
Position Limit	100% of portfolio
Interest Charge Rate	5%
Minimum Stock Price for Buying	\$0.00
Allowable Trade Types	Equities, Mutual Funds, Bonds, Options, Futures, Future Options, Spots

Interest Earned on Cash	0%
Allow Trading on Margin	Yes
Day Trading Allowed	Yes
Short Selling Allowed	Yes
Trading End Date	02/12/2019 11:59 PM
Commission	\$10.00
Open Markets	US and International e.g: Hong Kong, London, Brazil, Crypto. Etc.

2. Trade Notes

Every time you place a trade, you are required to add a short “Trade Note”, a sentence or two providing justification for why they think each order is a good move for their portfolio. You cannot edit or delete Trade Notes.

3. Stock Trak Assignments

There are **optional** assignments available on Stock Trak to take. The assignments are available for participants to gain more knowledge in areas they are not familiar with. It is solely for the benefit of your knowledge. The amount of assignments you complete will not be considered when awarding winners. The assignment categories are as follows:

- The Basics: Investing Fundamentals, Trading Basics, Order Types
- Derivatives Trading
- Options Trading
- Career Development
- Personal Finance
- Intermediate Investing Tips

Competition Requirements

****Eligibility for prizes: Complete all requirements and be a UCI Undergraduate who has not previously won****

1. Complete CashCourse (www.cashcourse.org) by the end of the competition

- ❖ CashCourse is a free online financial literacy course that provides a variety of lessons to students to learn about personal finances. Complete all the lesson modules by the end of the competition (2/12/19).

2. Workshop

- ❖ Qualifiers:
Competitors must attend at least 1 workshop hosted by FLA in 2018-2019 to be a prize winner. Non-competitors are allowed to attend all workshops as well.

- ❖ Topics, Dates, and Locations

Workshop 1: Stock Market 101 <ul style="list-style-type: none">• November 6 (7-8:30pm) Room SB1 5200• November 7 (7-8:30pm) Room SB1 5200	Workshop 4: Types of Investors <ul style="list-style-type: none">• January 16 (7-8:30pm) Room SB1 5200
Workshop 2: Credit Cards + DIY Budget <ul style="list-style-type: none">• December 5 (7-8:30pm) Room SB1 1200• December 6 (7-8:30pm) Room SB1 1200	Workshop 5: Long-term Investment <ul style="list-style-type: none">• February 6 (7-8:30pm) Room SB1 5200• February 7 (7-8:30pm) Room SB1 5200
Workshop 3: Intermediate Investing <ul style="list-style-type: none">• January 15 (7-8:30pm) Room SB1 5200	

3. Strategy Paper

- ❖ Qualifiers:
Only participants who attended at least 1 workshop may submit a paper.
- ❖ Due Date:
February 22nd, 2019 11:59pm PST
- ❖ Format of the Strategy Paper
 - Times New Roman 12pt. font
 - Double spaced
 - 1-4 pages
- ❖ Components of the Strategy Paper
 - Overall description of investment strategy
 - Learning outcomes from trading and the workshops

4. Finalist Presentations

- ❖ Qualifiers:
Participants with the top 10 Strategy Papers will be chosen as the finalists
- ❖ Date:
March 8th, 2019
- ❖ Format of Presentation:
Finalists will give a 10-15 PowerPoint presentation to a panel of judges
- ❖ Components of the Presentation:
 - Description of Finalist (previous experience with investments, major, etc.)
 - Investment Strategy
 - Summary of trading history
 - Learning growth/outcomes
 - Why you should win

Judging Criteria

- Strategy Paper: 30%
- Presentation: 30%
- Participation throughout the competition: 30%
- Return on Investment: 10%

Prize Winners

- 1st Place: \$1,000
- 2nd Place: \$750
- 3rd Place: \$500

Available Resources

1.Contact/Follow Us

- Email: fla.ucirvine@gmail.com
- Website: flauci.weebly.com
- Facebook: Financial Literacy Association FLA at UCI
- Instagram: [@fla.uci](https://www.instagram.com/fla.uci)
- LinkedIn: [@UCI Financial Literacy Association](https://www.linkedin.com/company/uci-financial-literacy-association)

2.Workshops

- Every month, we will be offering workshops to help you learn more about stocks and investment strategies. Everyone is required to attend at least one workshop.

3.Office Hours

- Office hours are for students to go in person to meet with professionals in the Finance industry are offered by request. You are free to ask questions specific to the stock market competition and investment strategies. To book an office hour, email: fla.ucirvine@gmail.com

4. Stock Trak

- [FAQs](#)
- [User Guide to Stock Trak](#)
- [Understanding Stock Quotes](#)
- [How to Pick Stocks](#)
- [Video](#)

Timeline

NOVEMBER

Competition Begins	October 25th
Workshop #1 Stock Market 101	November 6 th . 7-8:30pm Room SB1 5200
Workshop #1 Stock Market 101	November 7 th . 7-8:30pm Room SB1 5200
FLA Meeting #1	November 13 th . 7:30-8:30pm Room SB1 5200
FLA Meeting #2	November 27 th . 7:30-8:30pm Room SB1 5200

DECEMBER

Workshop #2 Credit Cards + DIY Budget	December 5 th . 7-8:30pm Room SB1 1200
Workshop #2 Credit Cards + DIY Budget	December 6 th . 7-8:30pm Room SB1 1200
FLA Meeting #3	December 11 th 7:30-8:30pm Room MPAA 100

JANURARY

FLA Meeting #4	January 8 th . 7:30-8:30pm Room SB1 5200
Workshop #3 Intermediate Investing	January 15 th . 7-8:30pm Room SB1 5200
Workshop #4 Types of Investors	January 16 th . 7-8:30pm Room SB1 5200
FLA Meeting #5	January 22 nd . 7:30-8:30pm Room SB1 5200

FEBRUARY

FLA Meeting #6	February 5 th . 7:30-8:30pm Room MPAA 100
Workshop #5 Long-term Investment	February 6 th . 7-8:30pm Room SB1 5200
Workshop #5 Long-term Investment	February 7 th . 7-8:30pm Room SB1 5200
Competition Ends	Friday, February 12 th 11:59:pm
FLA Meeting #6	February 19 th . 7:30-8:30pm Room SB1 5200
Strategy Paper Due	Friday, February 22 nd 11:59pm

MARCH

FLA Meeting #7	March 5 th . 7:30-8:30pm Room SB1 5200
Finalist Presentations	March 8 th
Award Ceremony	March 15 th

APRIL

FLA Meeting #8	April 2 nd . 7:30-8:30pm Room SB1 5200
FLA Meeting #9	April 16 th 7:30-8:30pm Room SB1 5200
FLA Meeting #10	April 30 th 7:30-8:30pm Room SB1 5200

MAY

FLA Meeting #11	May 14 th 7:30-8:30pm Room SB1 5200
-----------------	--