



2024-2025: Competition Participant

BADGE CRITERIA

Participated as a member of a small, school-based team in the 2024-2025 Wharton Global High School Investment Competition.

Over 11 weeks, the team met the minimum requirements for the competition, including actively using and testing their client investment strategy on an investment simulator, diversifying their portfolio within the scope of the competition, and completing two written deliverables: a Midterm and comprehensive Final Report.

Participants learned the fundamental concepts of long-term investing, including but not limited to risk, diversification, and company and industry analysis. They developed valuable teamwork, leadership, and communication skills for business.

COMPETITION LEARNING OBJECTIVES

At the conclusion of the competition, students who participated will be able to:

- Identify stocks and other investments that fit the needs of a client.
- Recognize the purpose of an investment strategy and develop one that aligns with the specific goals and objectives of the competition client.
- Express an investment strategy clearly and demonstrate creative thinking to make that strategy memorable and unique.
- Use stock analysis tools and strategies like SWOT and Porter's 5 Forces (and the research needed to support them, like company news and annual reports) to inform their decision making.
- Evaluate to the best of their ability the long-term financial potential of companies.
- Create a diversified portfolio that manages risk and reward.
- Determine and communicate rationale for purchasing stocks for both long and mid-term goals.
- Begin to identify movements and trends in the national and global economies that affect stock prices and impact portfolio performance.
- Recognize important stock market concepts, including exchange names, buying and selling securities, commission fees, and more.

- Demonstrate effective teamwork strategies through a collaborative and inclusive approach to all aspects of the competition, including strategy development, analysis, security selection, portfolio management and final report submission.
- Communicate a clear, concise and compelling written overview of the team's strategic and analytical approach to investing and investment decisions, as well as key tenets of the overall competition experience, such as teamwork and takeaways.

