Investment

BFS Winter 2025 | February 3, 2025



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Sign in and keep an eye out for the password!





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What is investing?

Investopedia defines investing as "putting money to work for a period of time in a project or undertaking to generate positive returns (profits that exceed the amount of the initial investment). It's the act of allocating resources, usually capital (i.e., money), with the expectation of generating an income, profit, or gains."





What can I invest in? Where do I go to invest?

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- Stocks
- Bonds
- Real Estate
- Crypto???
- 401K/IRA

- E*TRADE
- Charles Schwab
- Robinhood
- Coinbase
- And many more!



Why should I invest?



You will need money for when you retire, and by investing money early on in your career, you can accumulate wealth and have a lot of money by the time you retire.

Money builds over time

If you just keep money in an account, it will start to lose value over time due to inflation. By investing your money, you can grow your money and beat inflation.

Making big purchases

If you want to buy a house or car or something that has a lot of value, you will need to set aside funds in advance.



Essential Skills

- Understanding financial data and statements
- Risk management
- Understanding the market and market trends
- Excel and Financial Modeling (future winter GM!)





Who would do good in Investing?

- Patience
- Perseverance
- Coachability
- Rational thinking

- Business related majors
- Analytical & math-heavy majors
- Jack of all trades!



Careers in Investing

Financial Analyst

Evaluate investments using financial data, trends, and company performances to provide recommendations for buying, selling, or holding investments.

Portfolio Manager

Manage the investment portfolio of clients. Make decisions about which assets to buy or sell

Venture Capitalist

Invest in startup companies with high growth potential. Provide funding in exchange for equity and helping the company succeed.



Careers in Investing Part 2



Investment Banker

Help companies raise capital by issuing stocks and bonds. Advise companies on mergers and acquisitions.

Come to Spring Quarter IB Workshop series!

Private Equity

Buys out existing businesses or invests in start-ups with the intention of improving the company and selling it for a profit.

Day Trader

Someone who buys and sells stocks in the same day.





Sign in Sheet!



"The stock market is a device for transferring money from the impatient to the **patient**."

Password: PATIENT



Finding the Right Stocks

- Research and understand the business
 - Brand image, target market, competitive advantage
- Key ratios:
 - Profitability, efficiency, liquidity, debt
- Defensive investing
 - Dividends
 - Stock buybacks



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Investment Strategies

- Buy Low, Sell High
 - Moving averages
- Diversification!!
- Defensive investing: playing it safe
 - Dividends and stock buybacks
- Short selling
- Margin trading



Additional Resources

Books: The Intelligent Investor - Benjamin Graham The Holy Grail of Investing - Tony Robbins

Websites: Schwab.com/learn Investopedia.com/investing







Your task now!

Practice/try it out! 1) Sign up for the Stock Market game; look up stocks to sell and explain your reasoning 2) Ask questions Network with our members/Board 3) **Request future GM topics! 4**)





BFS Winter 2025

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About the Game

- Learn about investing in a simulated trading environment
- Try your hand (luck?) at making money with money!
- 1) Present till March 21st
- 2) Begin with \$100,000
- 3) Top performers receive **prizes**!! (based on value of portfolio)
- 4) Create free account on MarketWatch; join using the unique code provided by BFS
- 5) Leaderboards will be posted every week via mailing list





Rules

- Please use your real name for the game (So we can find you for prizes)
- 2) Participants can use the funds to buy, sell, and short stocks listed on major U.S. stock exchanges (e.g. NYSE, NASDAQ)
- 3) Margin Trading allowed
- 4) Shorting selling allowed, but participants must be aware of the associated risks
- 5) Participants can allocate no more than 20% of their portfolio to any single stock. This is to encourage diversification.
- 6) Participants may only play through a single account. Anyone found creating multiple accounts will be disqualified.







Product Demo

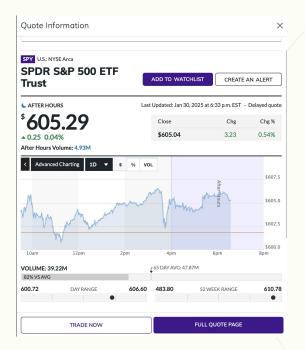
Symbol Search / Trade

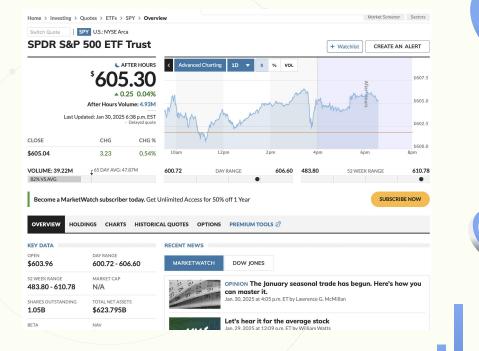
spy	×
Displaying 10 results	
SPPY	605.04
SPDR S&P 500 ETF Trust	3.23 0.54% TRADE
SYRE	22.27
Spyre Therapeutics Inc.	0.37 1.69% TRADE
SPYM	28.00
Tradr 2X Long SPY Monthly ETF	0.23 0.83% TRADE
SPYB	27.89
Tradr 2X Long SPY Weekly ETF	0.27 0.99% TRADE
SPYQ	27.18
Tradr 2X Long SPY Quarterly ETF	0.25 0.93% TRADE
SPYGX	21.49
Spyglass Growth Fund;Institutional	0.24 1.13% TRADE
SPYG	90.65
SPDR Portfolio S&P 500 Growth ETF	0.81 0.90% TRADE
SPYV	52.89
SPDR Portfolio S&P 500 Value ETF	0.07 0.13% TRADE

Trade Order			>
Enter Company or Symbol			Q
BUY	SELL SHORT	SELL	BUY TO COVER
		10	O Shares
Portfolio Allocation		Use the slider to set a	value or enter one manual!
Portiono Anocation			
Term	_		
DAY OR	DER	GOOD TIL	CANCELED
Order Summary			
Price per share			\$605.04
\$			10
Commission			\$10.00
Total			\$6,060.40
		*Estim	ate based on current quote price
SEE QUOTE		CLEAR	SUBMIT ORDER

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Product Demo









Leaderboard

Download Rankings 🛓

Game Leaderboard

♡ Name	Net Worth	Today's Gains	Trades	Total Returns
1 JUSTIN GENTLE	\$1,614,882.18	0.01%	123	\$1,514,882.18
2 Henry Nguyen	\$1,075,205.22	0.01%	53	\$975,205.22
3 Tyler Dickinson	\$220,067.28	4.07%	14	\$120,067.28
4 NEVAN HUGHLETT	\$166,144.03	0.83%	1	\$66,144.03
5 Jinghe Jiang	\$155,583.80	6.47%	6	\$55,583.80
⁶ JARRETT CHIN	\$133,467.84	6.49%	2	\$33,467.84
7 Daniel Chiarelli	\$130,548.41	2.67%	4	\$30,548.41
8 Nick Weaver	\$123,325.75	0.70%	17	\$23,325.75
9 Corey Shen	\$123,023.18	8.47%	6	\$23,023.18
10 Evan Hsu	\$121,373.72	2.34%	9	\$21,373.72





ARE YOU READY?



Password: bruinfinance



Questions?



Sign in if you haven't already!

Password: PATIENT

Dining Hall run afterwards!



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Jane Doe

+34 654 321 432 | jane@freepik.com

"I always strive for **excellence**. I believe in the power of **collaboration**, and I love to build **meaningful relationships** with clients throughout the **creative process**"



2010- 2014	Business degree	Write hereWrite hereWrite here
2016- 2017	Economy master	Write hereWrite hereWrite here
2017- 2019	Digital business master	Write hereWrite hereWrite here

Experience

Now-2021	Position A	Place A
Write hereWrite here	•	
2021-2016	Position B	Place B
Write hereWrite here		
2016-2014	Position	Place C
• Write here	your tasks	

• Write here your tasks





Cover letter

Slidesgo +91 610 419 373 slidesgo@freepik.com

Welcome to my portfolio!

I'm [name], a highly creative and motivated individual, with a passion for [field of expertise]. My portfolio is filled with unique and inspiring content, which showcases my skills in the field.

Here you will find everything ranging from writing samples, photographs, videos and more. I strive for excellence in all that I do, and this portfolio serves as a testament to my capabilities and accomplishments.

Have a look around, get to know me better, and don't hesitate to reach out if you have any questions or would like to collaborate!

Sincerely,

Jane Doe

+91 620 421 838 | jane@freepik.com



Photo showcase

This photo showcase is a collection of stunning images, each capturing a unique moment in time. Let them inspire you!

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My best work

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"In my best work, I successfully led a high-profile merger and acquisition deal, orchestrating complex financial negotiations and strategic decision-making, resulting in a transformative outcome for the client"



"Hard work is the key to unlocking your true potential" +



What people say about me

Employer 1

"I have been impressed by the quality, attention to detail and creative approach brought to every project made"

Employer 3

"This person has a strong technical understanding in order to develop successful strategies. Highly recommended for any kind of project or task"

Employer 2

"Projects and campaigns are always taken to another level with ideas that come from this person. Business and economics experience is quite evident"



Employer 4

This person is an invaluable asset to our investment banking team, consistently delivering exceptional results and demonstrating deep expertise in complex financial transactions"



My skills and qualifications

Leadership

"I possess leadership abilities that have been sharpened through past roles where I was responsible for the teams"

Problem-solving

"My problem-solving capabilities have enabled me to solve difficult issues in the past, using creative and innovative solutions"

Communications

"With excellent verbal and written skills, I can effectively convey complex messages to a variety of audiences"



Organization

"My proactivity allows me to plan ahead and prioritize tasks according to objectives and different deadlines"

Technical skill

"I am knowledgeable in several technical areas such as programming languages that support my ambition in my field"

Interpersonal skill

"Teamwork is one of the essential part of my daily job, and I am sensitive towards different cultures"





A chart of the areas I work in

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Table

Project title	Skills	Date	Ref
Project 1	Customer service	Jan 2022	[Link or reference]
Project 2	Computer knowledge	Feb 2022	[Link or reference]
Project 3	Organization	Mar 2022	[Link or reference]
Project 4	Processing loans	Apr 2022	[Link or reference]
Project 5	Basic accounting	May 2022	[Link or reference]
Project 6	Conflict resolution	Jun 2022	[Link or reference]



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Roadmap of my future projects

Initiative Objective	Objective	Q1		Q2		Q3			Q3				
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Expand client base	Increase client acquisition through targeted marketing												
Diversify service offerings	Introduce new financial products to meet emerging market demands												
Enhance advisory services	Provide comprehensive financial analysis and recommendations												
Strengthen compliance	Implement robust risk management												
Foster innovation	Leverage technology for operational efficiency												
Invest in professional development	Pursue industry certifications and attend conferences												





Thanks!

Do you have any questions?

youremail@freepik.com +34 654 321 432 yourwebsite.com



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Vectors

• <u>Flat design finances concept</u> <u>infographic</u>









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Resources

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- Money with piggy bank arrangement
- Medium shot woman holding credit card
- <u>Close up man holding tickets</u>
- Portrait of young african businesswoman holding clipboard looking away
- Young business people
- <u>Businessman on a terrace</u>

