

Investing & Trading

GM

2025-11-24 Investing Workshop F25



Sign in sheet

Keep an eye
out for the
password!->

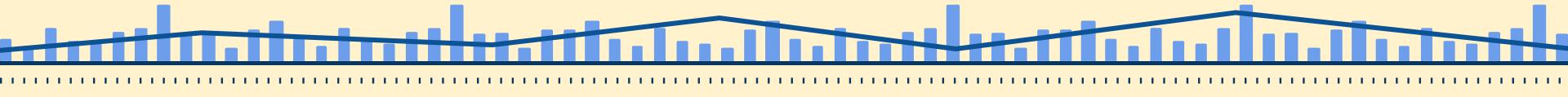
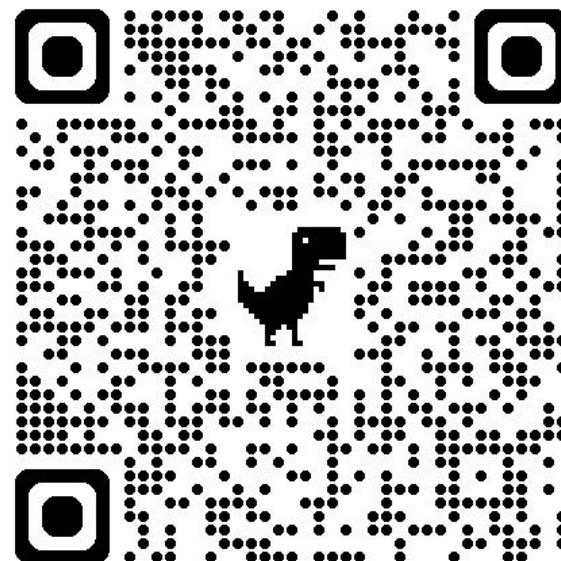




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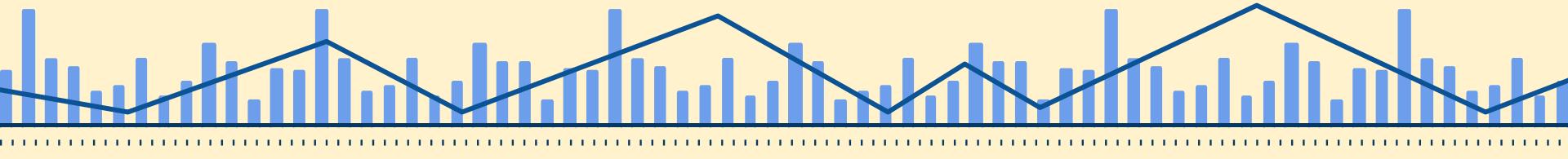
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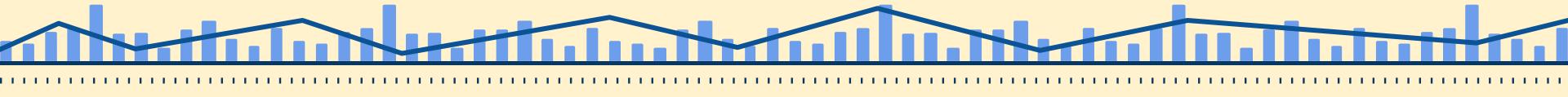
Stock Market Game





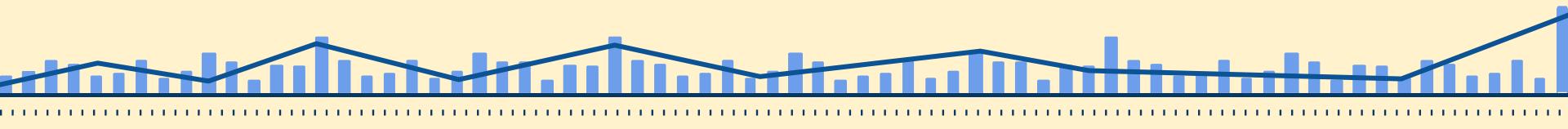
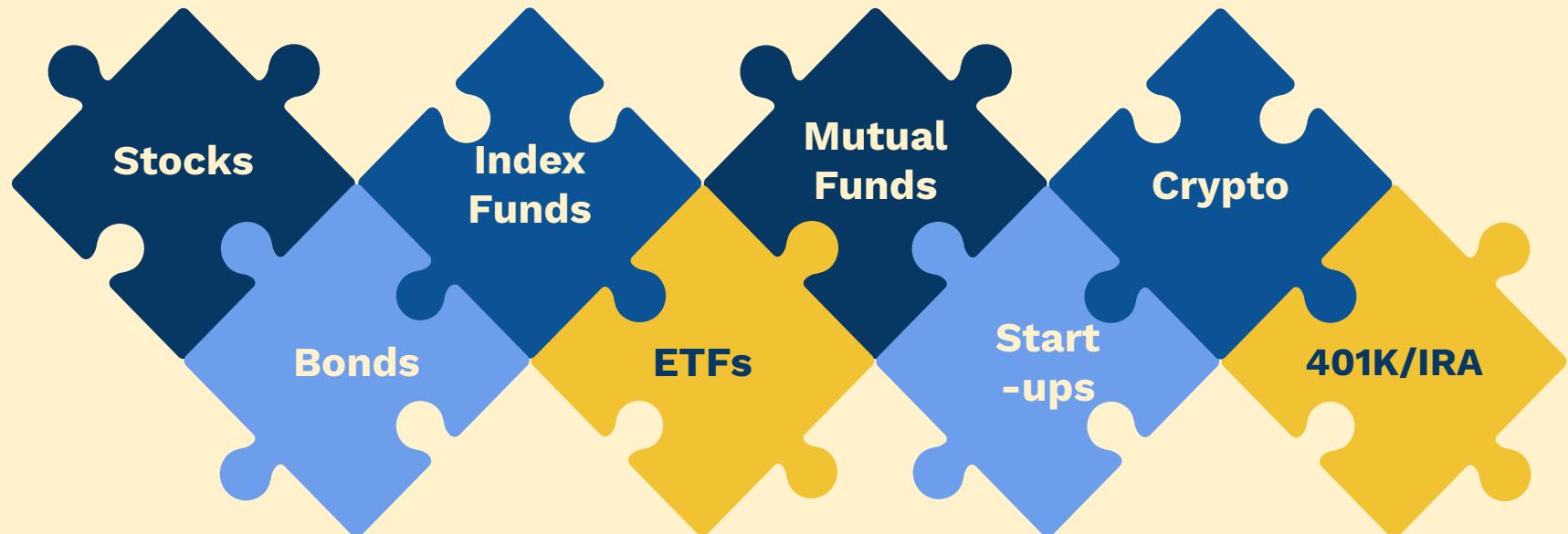
What is investing?

- Putting money to work for a period of time to earn positive returns
- Aiming to make profits that are higher than the amount you first invested
- Allocating money into projects or assets with the expectation of income or gains



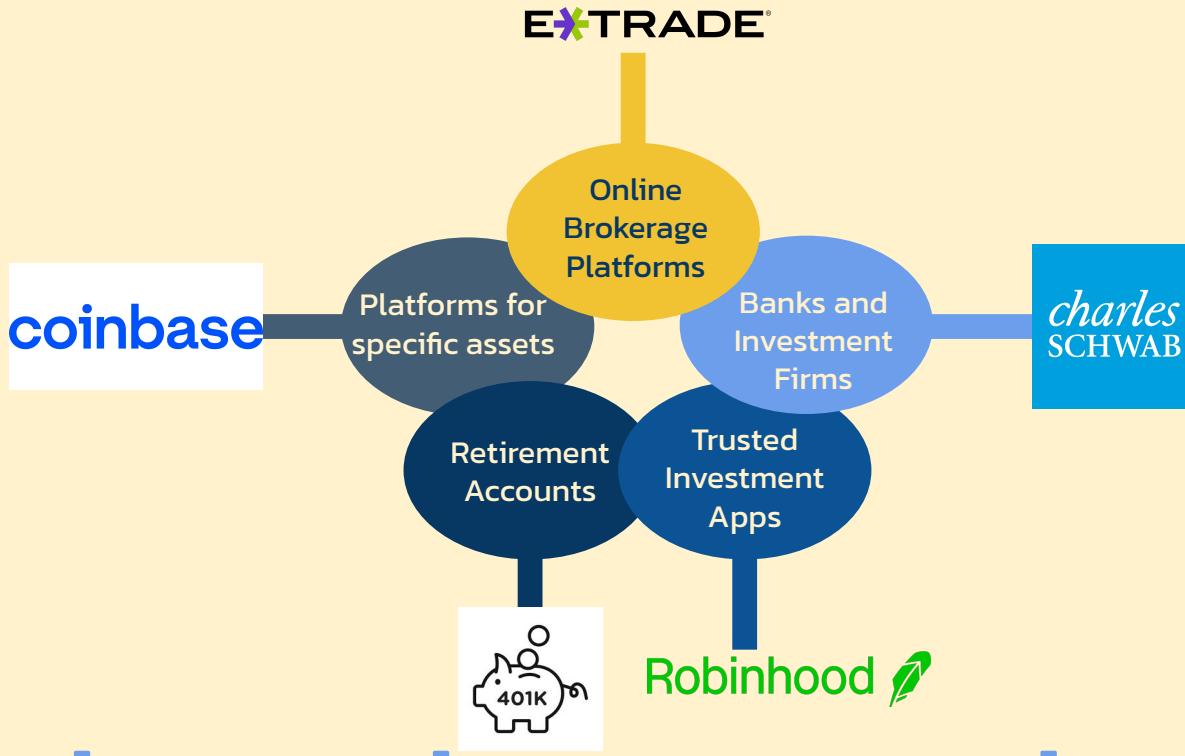


What can I invest in?





Where do I go to invest?





Why should I invest?



Save for retirement

Investing early helps your money grow across many years

You build a financial cushion for life after work



Money Grows over time

Investments can grow faster than inflation

Your money increases through returns instead of losing value in a simple account



Prepare for big purchases

Helps you save for things like a home, a car, or education

Investing makes it easier to reach long term goals without relying only on income





Essential Skills

Follow how markets move
and what affects prices

Learn basic tools to
analyze data and
value companies

**Understand
financial data
& statements**

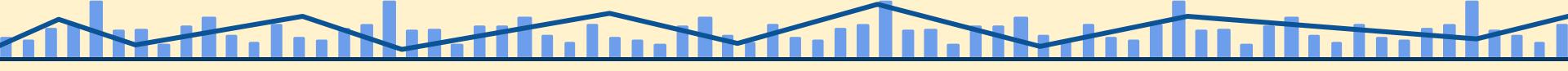
**Risk
management**

**Understand
the market
and trends**

**Excel and
financial
modeling**

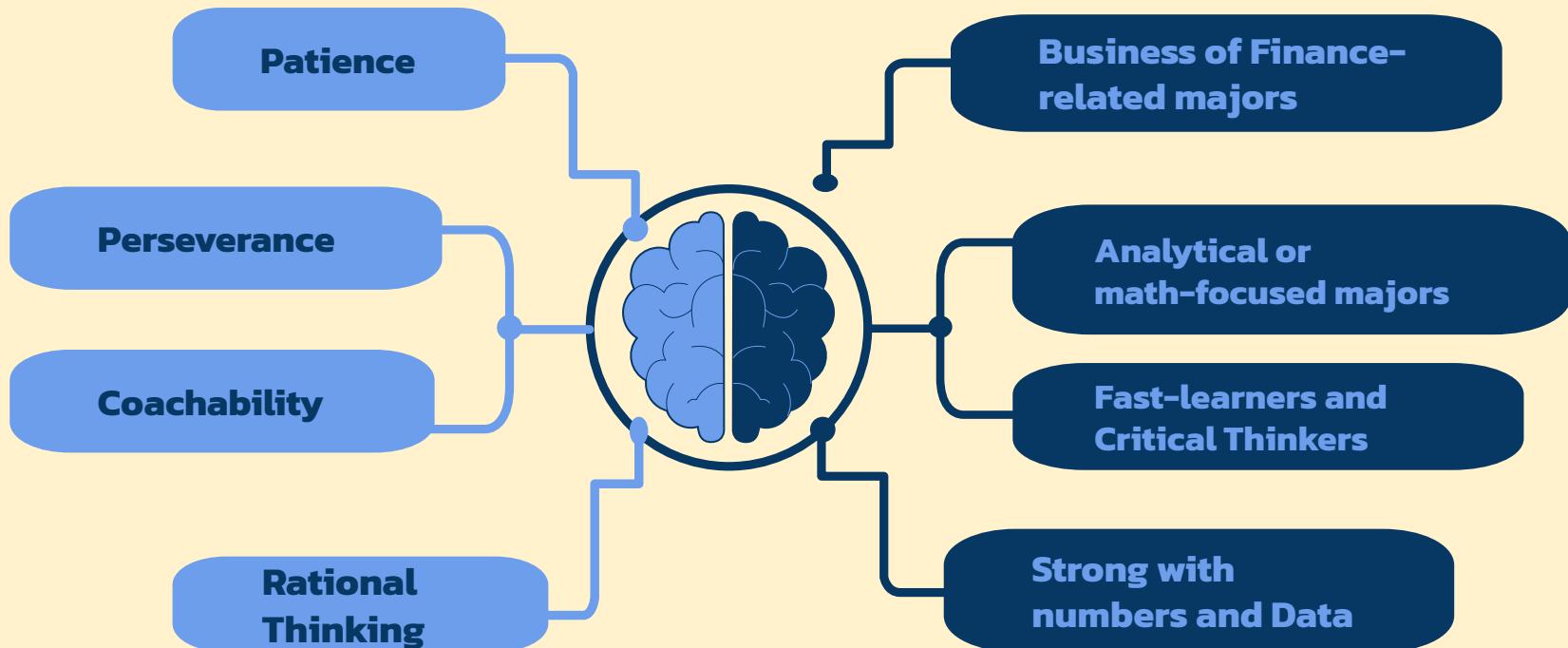
Know how to read income
statements, balance sheets,
and cash flows

Understand how risk
works and how to protect
your investments





Who would do good in Investing?

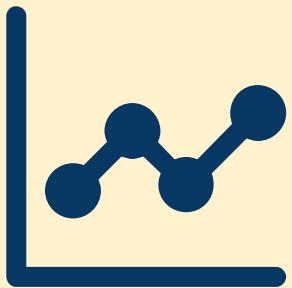




Careers in Investing



Financial
Analyst



Portfolio
Manager



Venture
Capitalist





Careers in Investing part 2



Investment
Banking



Private Equity

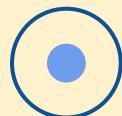


Day-Trading



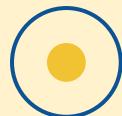


Finding the Right Stocks



Research the business

Know how the company makes its money and its products/services.



Key Ratios

Metrics to assess profitability, efficiency, liquidity, and debt levels.

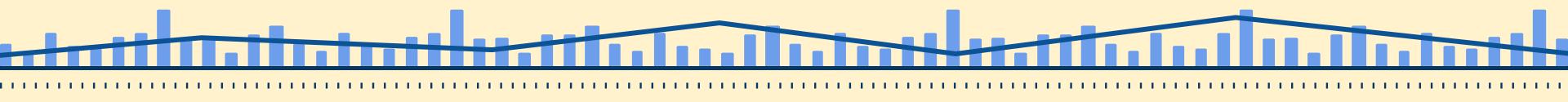


Defensive Investing

Focus on companies with stable earnings that resist recessions.



"If you're so good at picking winning stocks
why do you still have to work?"





Investment Strategies

Buy Low, Sell High



- Moving Averages

Defensive Investing



- Dividends and stock buybacks

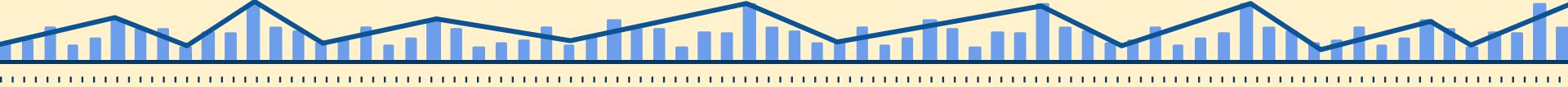
Diversification!!



Margin Trading



Short Selling



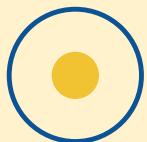
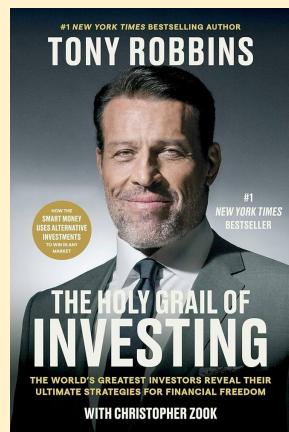
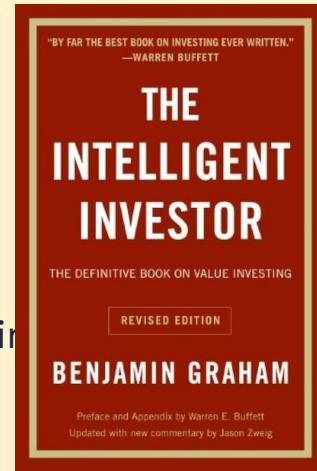


Additional Resources



Books

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



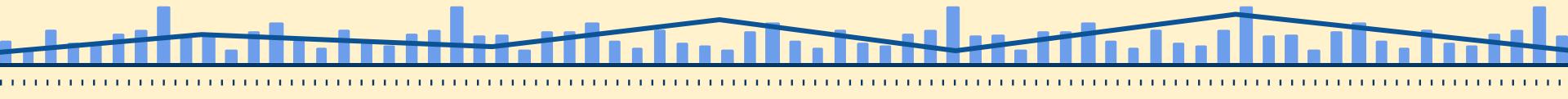
Websites:

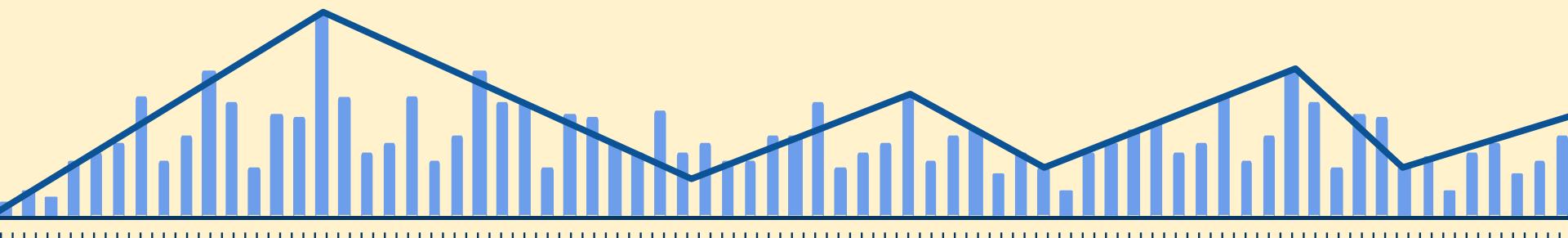
- [Schwab.com/learn](https://schwab.com/learn)
- [Investopedia.com/investing](https://investopedia.com/investing)



Your task now!

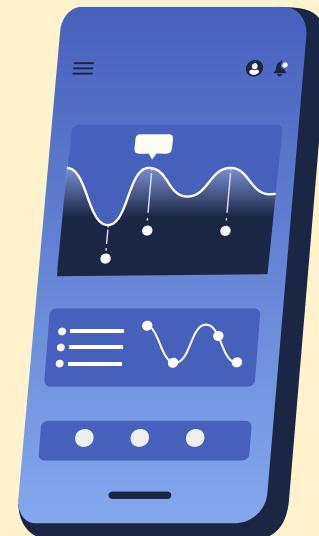
- 1) Practice/Try it out
 - a) Sign up for the Stock Market Game
 - b) Look up stocks to invest in and explain your reasoning
- 2) Ask Questions
- 3) Network with our members/Board





Stock Market Game

BFS Fall 2025





About the game

- Learn about investing in a simulated trading environment
- Try your hand (luck?) at making money with money!

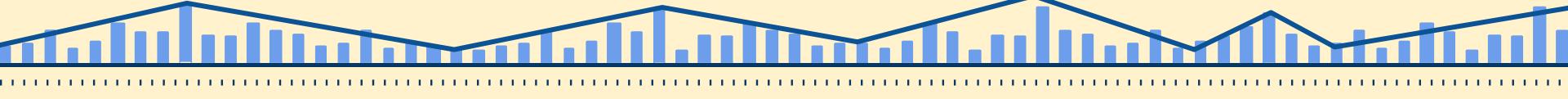
- 1) Present till March 21st
- 2) Begin with \$100,000
- 3) Top performers receive **prizes**!! (based on value of portfolio)
- 4) Create free account on MarketWatch; join using the unique code provided by BFS
- 5) Leaderboards will be posted every week via mailing list





Rules

1. 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

Displaying 10 results

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



Trade Order

Enter Company or Symbol

BUY SELL SHORT SELL BUY TO COVER

10 Shares

Use the slider to set a value or enter one manually.

Portfolio Allocation

Term DAY ORDER GOOD TIL CANCELED

Order Summary

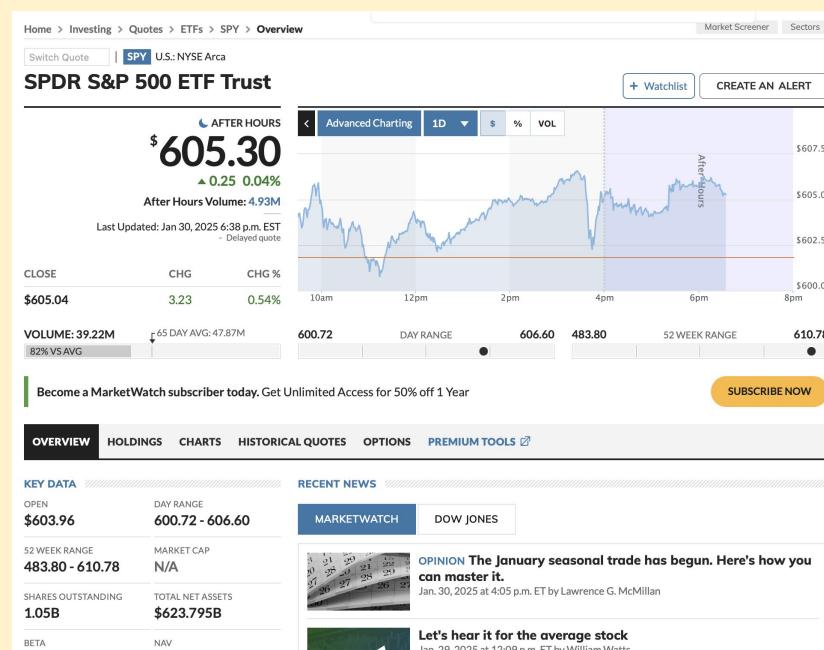
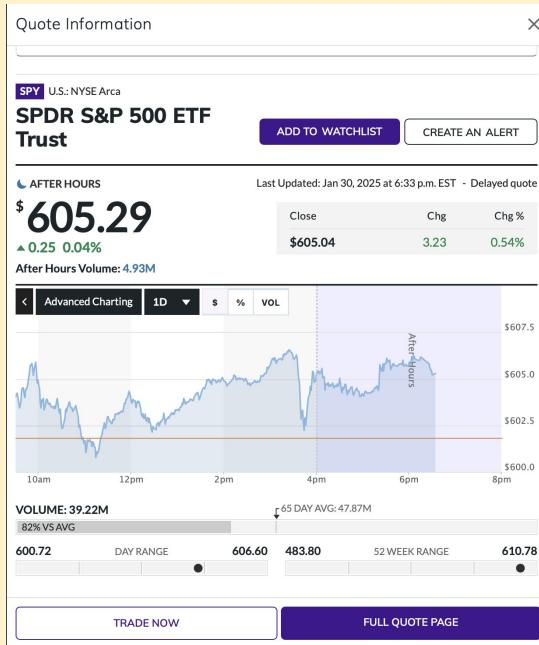
Price per share	\$605.04
\$	10
Commission	\$10.00
Total	\$6,060.40*

*Estimate based on current quote price

SEE QUOTE CLEAR SUBMIT ORDER

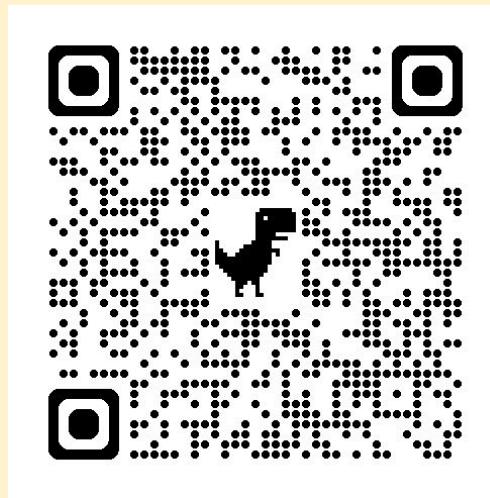


Product Demo

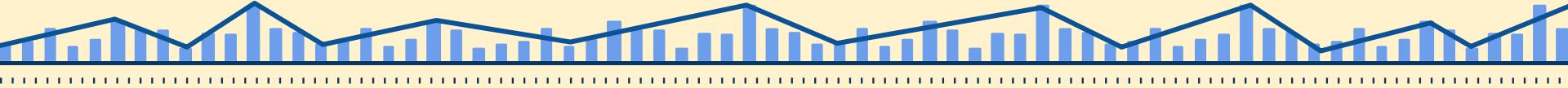




Are you ready?



Password: bruinfinance



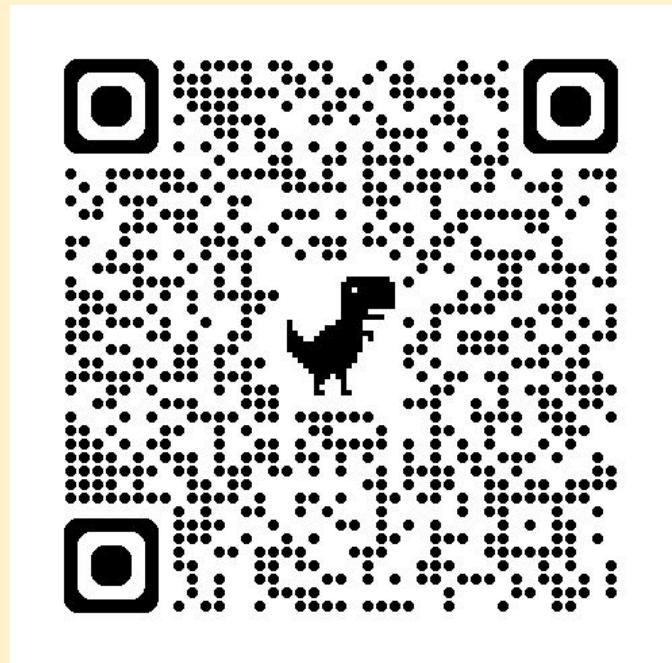


Questions?

**Sign in if you haven't
already!**

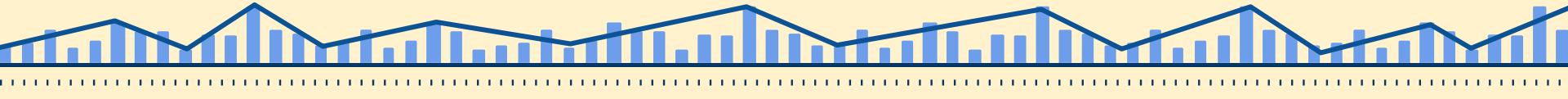
Password: Stocks

Dining Hall run afterwards!





Icon pack



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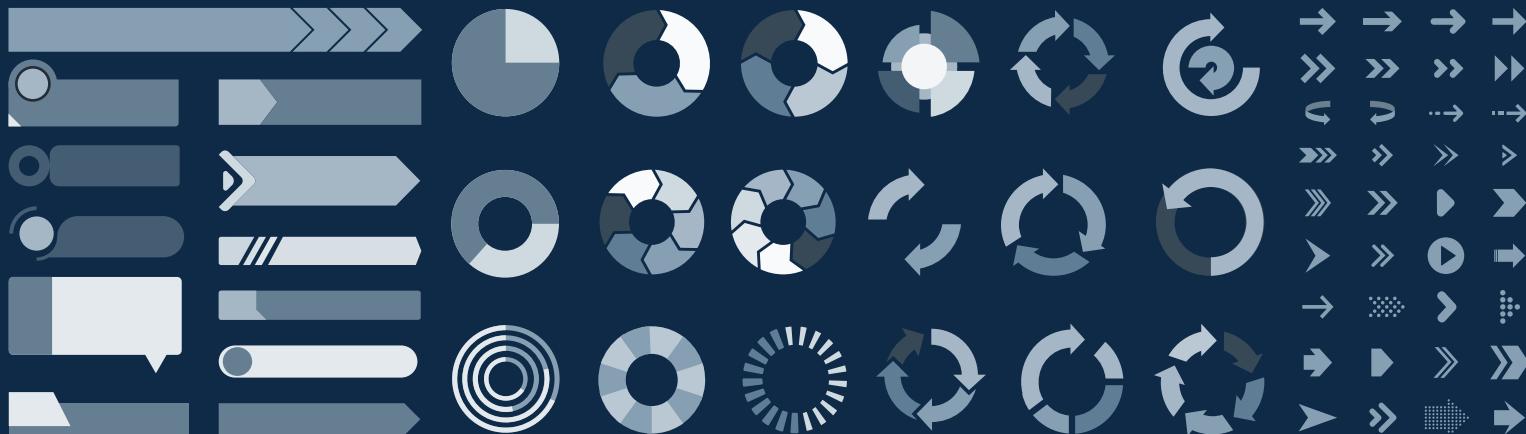
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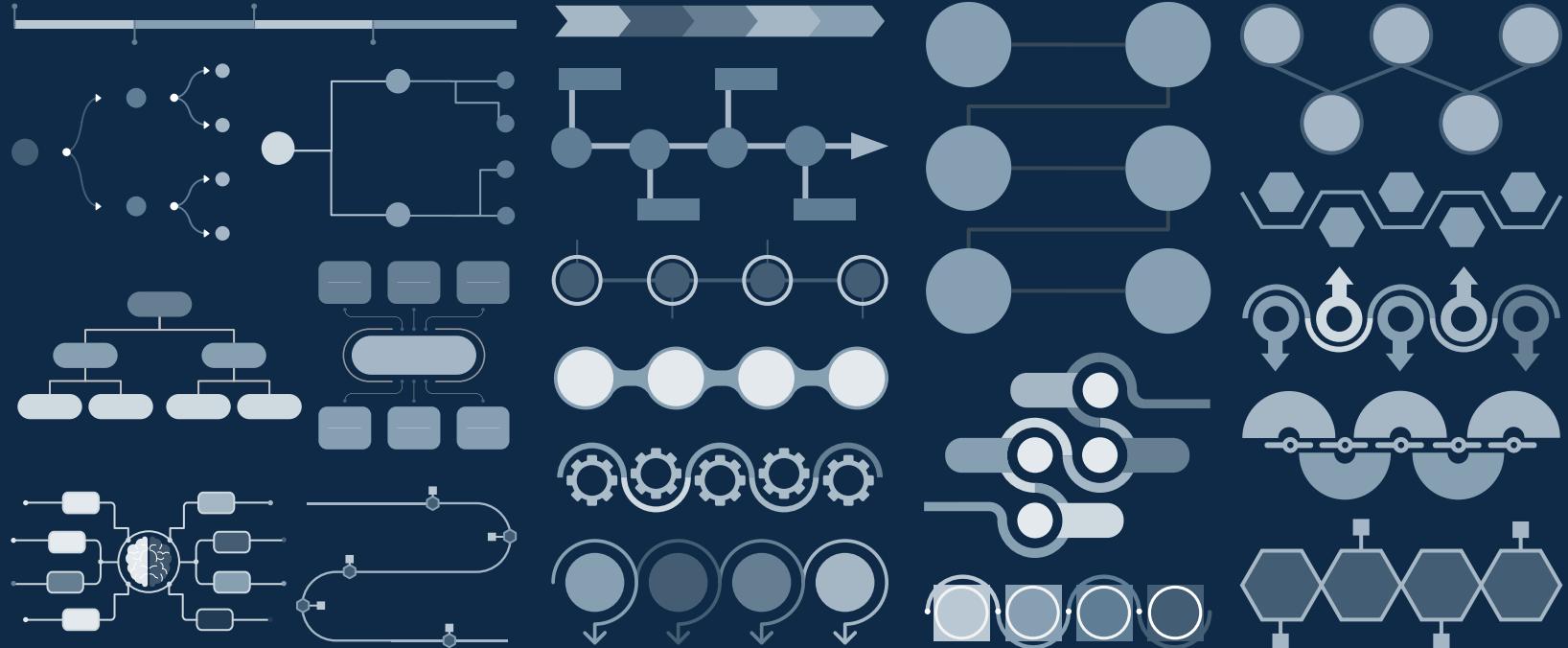
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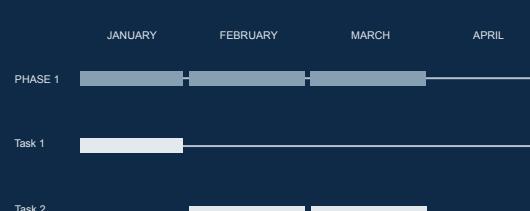
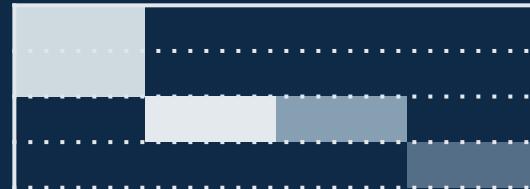
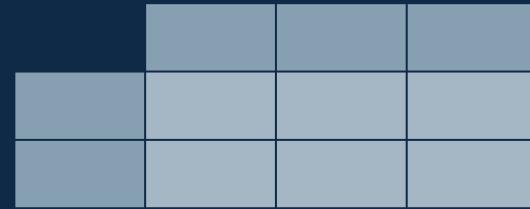
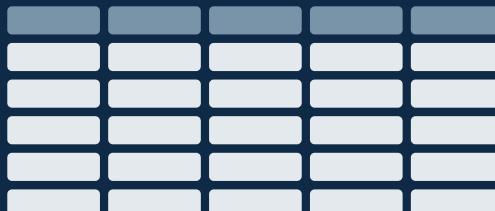
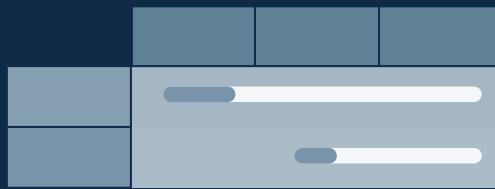
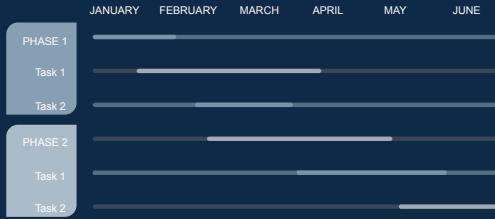
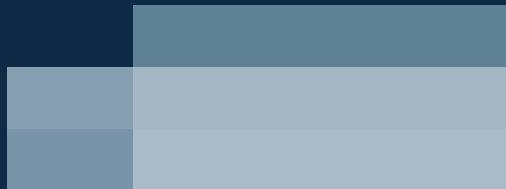
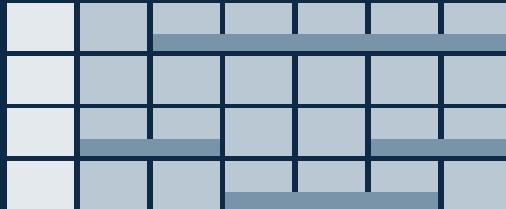
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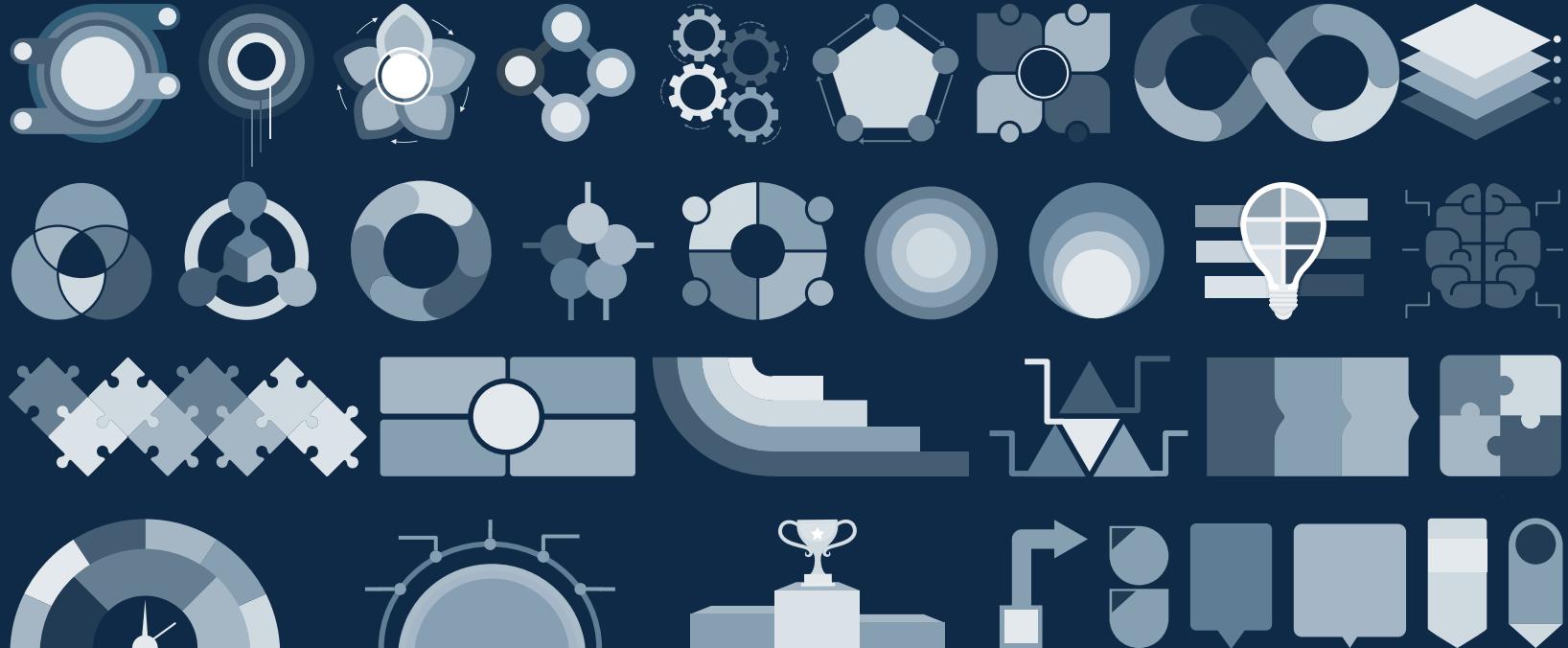
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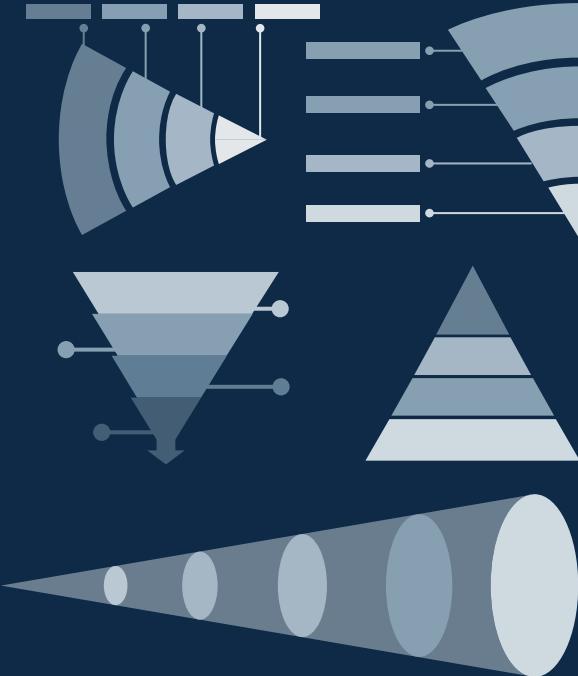
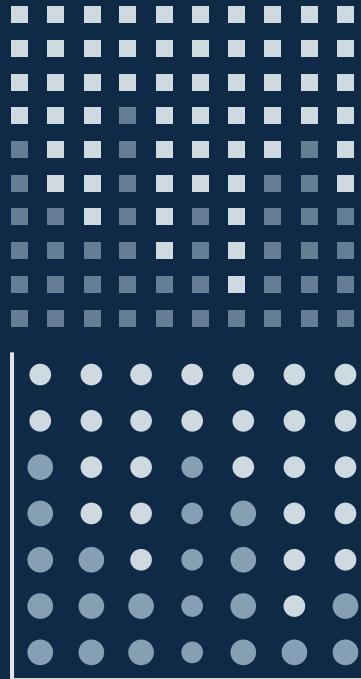












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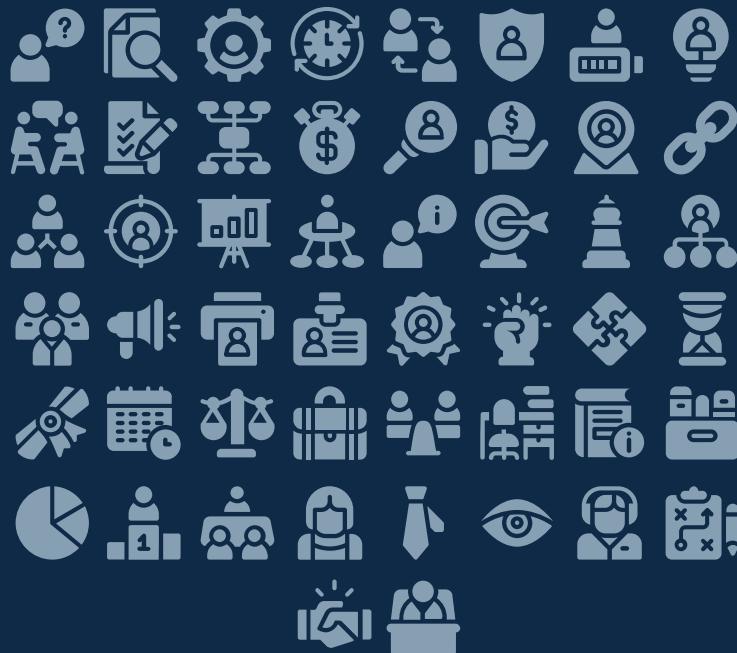
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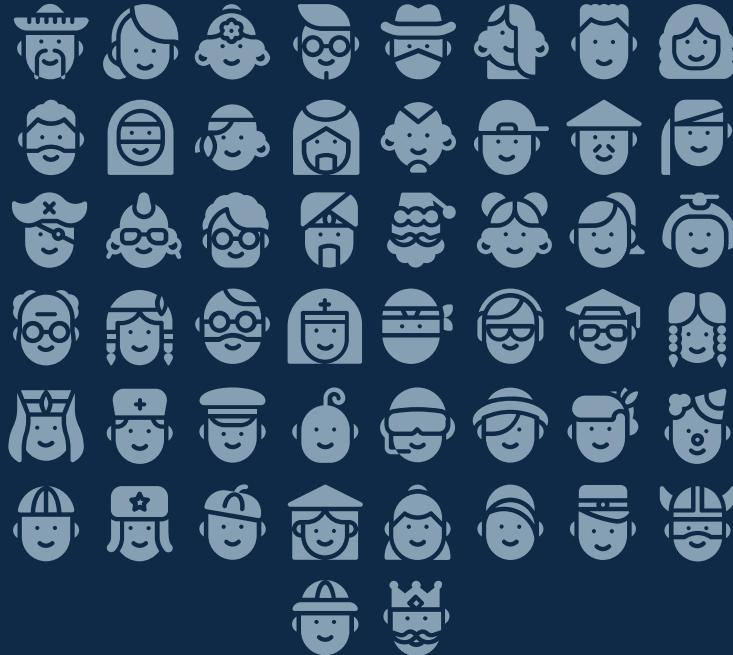
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