Quant Society's

Investment Competition

Information and Rules

Overview

This competition challenges students to act as junior investment analysts managing a virtual portfolio on behalf of a fictional client. Teams will develop an investment strategy, make trades in a stock market simulator, and submit a written report explaining their decisions.

Timeline

Week 1

Teams read their case study and answer a selection of questions

By the end of Week 1, each team must submit a one-paragraph strategy plan before they are permitted to begin trading.

Week 2-5

Trading officially begins.

All trades must follow the detailed trading rules found in an upcoming slide

Week 6

Trading officially ends and this week is given to work on and refine the final report. Report is due at the end of week 6.

Questions & Strategy Plan

Due
end of week 1

The questions that you are required to answer are:

- Who is the client and what are their goals?
- What is the timeline for each goal?
- How much risk should the portfolio take on?
- What industries align with the client's values?

Next, you have to also submit a one paragraph brief strategy plan. This must be a maximum of 250 words. Be very careful with this paragraph as this has to be cohesive with teh strategy through to the final report.

Final Report

Due
end of week 6

Page 1-2:

This should consist of 3 paragraphs under 150 words each:

- Who is your client?
- What are their financial goals?
- Why should your team be the team to manage Patrick's investments.

Page 3-5:

These pages should provide a breakdown of your portfolio both numerically and visually. For each stock, briefly explain how it pertains to the case study and how it is a good choice fundamentally. At the end, include a brief explanation of how your strategy was used.

Page 6:

This should consist of 2 paragraphs. One should be a conclusion for the whole report, and one should be a reflection of your trades, strategy, etc. Talk about what went wrong, how you can improve, what your shortcomings are, etc.

Formatting Rules

- Maximum of 6 pages
- Size 11 Times New Roman Font
- Double Spaced
- 1-inch Margins
- Cite sources (not included in the 6 pages)

Trading Rules

- No more than **40%** of the portfolio in a single stock or sector
- Minimum of **5 stocks or ETFs** must be in the final portfolio
- No new trades permitted during Week 6
- No short selling
- Teams may not copy another team's portfolio — originality matters

Judging Criteria

Understanding of client goals	20 points
Quality of investment strategy and reasoning	30 points
Portfolio diversification	15 points
Written report clarity	20 points
Portfolio Returns	15 points
Total	**100 points**

Important Note

Please keep in mind that the focus of this competition is more on long-term trading rather than short-term trading. This effectively means that keeping a lower volume of trades with better justifications is better, and that high short-term returns alone do not guarantee success in the competition.