

STOCK-SOC

(guidance notes to form and run a School Stock Society)

Aims and Objectives:

- Develop investment knowledge, market awareness, and critical thinking
- through research and peer discussions.
- Enhance communication, teamwork, and informed decision-making
- through stock pitches and debates.
- Provides exposure to real-world finance, industry trends, and connections
- with like-minded peers and professionals.

Time commitment:

- Weekly lunchtime/online meetings (45 mins)
- Meeting / presentation prep (1h)

Suggested Sector Focus:

- Food Retail
- Retail (non food, non fashion)
- Fashion Retail

Society Roles:

Managing Director - Y12 or Y13, x1

- Oversee the smooth running of Stock Soc
- Ensure aims and objectives are met
- Appoint VPs and facilitate weekly insight sessions

Operations Director

- Organise Meetings
- Recruitment
- Assist the MD as required

VPs Y12 or Y13 x1 per sector team:

- Runs a small sector team of analysts and traders
- Ensure deadlines are met and sessions are relevant
- Facilitate discussion within teams and share insights between teams.

Analysts Y10-12, x2-3 per team

- Research stock news and City Opinion
- Prepare weekly news summaries to share with teams

Traders Y10-12, x2-3 per team

- Research share price performance, volumes, indexation effect
- Prepare weekly trading summaries to share with teams

Stock Soc Annual Cycle

Term 1 - Retrospective trading:

- Follow a sector, practicing research and analysis methods.
- Share weekly insights within and between teams
- VP leads a presentation at the end of term to the society
- Director to oversee and encourage learning

Term 2 – Stock pitch:

First half term:

- Rotate sectors and get up to speed with news using previous team's presentation as a basis.
- Follow previous weekly research and sharing of insights

Second half term:

- Prepare for final presentation to take place at discretion of Director
- Each team to make a pitch at the end of the term of which will be winning stock in the sector over the next 8 weeks, and reasons why

Term 3 – Appraisal and future:

- Director and VPs to reflect on performance of individuals (not based on stock performance)
 - Choose roles for next year and promote the benefits to next year's potential members.
 - Elect next year's Director and VPs and discuss areas for improvement
- Recruit for future year

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