

## JUNIOR TRADER 2024/25 — TEACHER GUIDE

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### 1. Purpose of the Competition

This guide supports teachers running the Junior Trader 2024/25 competition. It explains timelines, expectations, supervision points, and how to help students complete their portfolios and reports confidently and independently.

### 2. Key Dates

Dealing submissions: 18th December  
Automatic liquidation: 9th January  
Preliminary Results: 16th January  
Report Submission: 30th January  
Final Results: 16th February 2026

### 3. Overview for Teachers

Students work in teams of 3–4 to create an investment portfolio for a fictional client. They must choose one security from each drop-down menu, justify their decisions, and write a report. Teachers oversee team formation, provide password access, ensure submissions are timely, and support research and organisation without giving the investment decisions themselves.

### 4. Teacher Responsibilities

- Form teams and confirm unique team names.
- Provide students with access to the dealing platform.
- Ensure portfolio submissions are completed no later than 18th December.
- Oversee appropriate use of school IT and research resources.
- Support students in interpreting economic language without giving them recommendations.
- Ensure each student contributes to the final written report.
- Submit reports on due date.

## 5. Student Responsibilities

- Understand the client's risk profile and seasonal context.
- Research retailers, indices, commodities, currencies and wider economic influences.
- Choose one asset from each drop-down category (10–25% allocation each).
- Total allocation must equal 100%.
- Prepare a structured, evidence-based written report.
- Sign the report and work collaboratively.

## 6. Support Teachers Can Provide

Teachers may:

- Help students search for reliable economic data.
- Explain terminology (inflation, index, commodity, currency, etc.).
- Encourage teamwork and time management.
- Provide guidance on writing structure, clarity, and referencing.

Teachers must not:

- Tell students which assets to pick.
- Construct their portfolio allocations.
- Influence their thematic or strategic decisions.
- Edit content beyond normal literacy feedback.

## 7. Portfolio Requirements

Students choose:

- 1 Fashion Retailer
- 1 Food Retailer
- 1 Online Retailer
- 1 Index
- 1 Commodity (metal)
- 1 Currency
- 1 Cash option (optional)

They must justify choices using economic reasoning appropriate for their age level.

## 8. The Client Context Summary

The client is a 31-year-old professional footballer with declining future earnings, a medium–low risk profile, and strong seasonal insight into festive retail behaviour. Students must balance her insight with responsible long-term planning. She is also responsible for choosing an index, metal, and currency to balance her portfolio.

## 9. The Written Report

To achieve certification, each team must submit a report of at least 4 pages that covers:

- Theme and reasoning
- Asset choices and allocations
- Sector analysis
- Performance review post-liquidation
- Evidence used (news, data, reports)
- Team signatures

Reports should be clear, concise and in students' own words.

## 10. Report Marking Framework (Suggested)

- Theme & understanding of client (25%)
- Portfolio construction (25%)
- Evidence & reasoning (25%)
- Presentation & clarity (25%)

Special commendations:

- Beat the Machine (Charlie)
- Beat the Founder (Marc)
- Master Trader – Grand Champion (beats both benchmarks)

## 11. Academic Integrity

Reports must be the students' own work. AI may be used only for:

- grammar checking
- fact-checking

- explaining terminology

AI may NOT:

- choose assets
- write the portfolio strategy
- justify the allocation
- produce paragraphs of the final report

Teachers should remind students that originality is essential.

## 12. FAQ for Teachers

Q: Can teachers run lunchtime support sessions?

A: Yes — encourage structured working times.

Q: Can teams change members mid-way?

A: No, unless exceptional circumstances arise.

Q: Can students redo their trade submission?

A: No — one submission only.

Q: Do teachers mark the reports?

A: No, but final awards may be cross-reviewed if so wished.

## 13. Contact & Support

For password queries, technical issues, or general questions, contact your Junior Trader coordinator or support inbox. Schools should keep a record of submitted portfolios and reports.