

JUNIOR TRADER 2025/26 — OFFICIAL RULE BOOK

The Winter Retail Challenge • Strategy Meets Competition

1. The Client Scenario

Your client for the 2025/26 season is a 31-year-old professional female footballer at the peak of her career. Her Financial Advisor warns that her sporting income will predictably decline through her 30s, so her pension planning must be cautious. She is officially rated “long term income based medium–low risk,” but she still wants to take part in shaping her investment choices. As a brand ambassador for major fashion, food, and online retail brands, and as a well-followed social media figure and a young parent, she believes she has genuine insight into festive consumer behaviour, more so than the professionals.

After negotiation, her Advisor has allowed her to “play” with a limited portion of her wealth during the Christmas trading window (up to 20%, you choose and reason why). Your mission is to construct a portfolio that uses her festive retail insight while still protecting her long-term financial stability.

2. a Competition Structure

Teams of 3 or 4 traders must register under a unique team name inspired by a global financial institution, combined with your school name. No duplicate team names are allowed. E.G MGS Barclays

b. Key Dates

Dealing submissions 18th December 2025

Automatic liquidation 9th January 2026

Preliminary Results 16th January 2026

Report Submission 30th January 2026

Results 16th February 2026

3. The Dealing Platform

Trading takes place at www.junior-trader.com in the dealing room. Entrants will receive a password to access the Dealing Room.

4. Your One Shot

The only dealing day is Friday 18th December 2025 before the market close (4:30pm). Teams may submit trades any time before this deadline. You have ONE submission. No edits, no corrections. Once you click SUBMIT TRADE, your positions are locked in.

5. Mandatory Portfolio Allocation

Teams must choose one security from every drop-down menu on the platform. These include: Fashion Retailer, Food Retailer, Online Retailer, Index, Commodity, Currency, Cash Option. Each asset must be allocated between 10–25%. The final portfolio must total exactly 100%. Any error above or below 100% is forfeited to a public Error Account.

6. Themes & Strategy

Portfolios must be built around a thematic view of the market—something expected to influence markets between December and mid-January. Examples include festive retail patterns, inflation, supply-chain conditions, online shopping momentum, commodity behaviour, or general market sentiment. Political forecasting is forbidden. Themes must be explained in the final report.

7. Automatic Liquidation

All student portfolios will be automatically liquidated on 9th January 2026. No changes may be made after the first trade submission.

8. The Investment Report

To receive individual certificates, students must contribute to a Team Investment Report of at least 4 pages. It must explain: the investment theme, the allocation

rationale, subsector decisions, and a performance review. Reports must be concise, evidence-based, and signed by all contributing team members. Your teacher has more notes on how the mark scheme is structured.

9. How You're Scored

Final results are based on: 50% – The Written Report, 50% – Peer Relative Trading Performance. Any team outperforming the benchmark portfolio will receive a commendation.

10. What You Must Demonstrate

Teams must show: understanding of the client's risk profile, insight into market drivers, balanced portfolio construction, clear, defensible reasoning, and use of evidence such as inflation data, trading statements, and analyst commentary.

11. Founder & AI Challenge Portfolios

Two benchmark entries will be submitted:

A. Charlie's Portfolio — an AI-driven, data-modelled benchmark.

B. Marc's Portfolio — using real-world trading instinct. Teams that outperform either portfolio earn a 'Beat the Machine' or 'Beat the Founder' commendation will be commended

Teams that outperform BOTH earn elite status:

'Master Trader – 2025/26 Grand Champion.'