Junior Trader

Junior Trader Plus

My Investment Philosopy

Your task

Develop and explain your own personal investment philosophy.

An investment philosophy is the set of principles you would use when deciding whether a company represents a good long-term investment. There is no single correct approach. We are interested in how you think, what you consider important and how you justify your decisions.

What should you consider?

Think about what you have learned during Junior Trader+ and consider questions such as:

- What makes a good company different from a good investment?
- What financial information would you examine?
- How important are management, strategy and competitive advantage?
- How would you think about risk?
- Does valuation matter even when you believe a company is excellent?
- What might make you change your mind about an investment?

You do not need to cover every question. Use them to help develop your own approach.

What to submit

Write approximately 400–600 words explaining your investment philosophy.
Try to establish a small number of principles that genuinely reflect how you would approach investment decisions. Explain the reasoning behind them rather than producing a list of investment rules.
You may refer to companies or situations you have encountered during the programme to illustrate your thinking.
We are assessing judgement, reasoning and reflection, not whether your investment philosophy matches ours.