junior-trader.org

@juniortrader
@marcduschenes

Junior Trader

IN PERSON

#TradeSafe

AI has been used to enhance this presentation to deliver better graphics, simplify learning, and improve enrichment.

01 / MEET DEBBIE MOORE

What do you see in the picture?



02 / DIVERSITY IN FINANCE

The value of diversity in finance.

Wider perspectives

Better decisions

Stronger research

Closer to our customers and markets

A more inclusive and
high-performing workplace

EXPERIENCE. JUDGEMENT. OPPORTUNITY.

01 / SESSION PLAN

From learning to investing.

About Junior Trader and your trainer

How markets work and the language of finance

The Investment Challenge and your client

Research, portfolio construction and trading

Learning from decisions and reflection

Results, recognition and JT+

02 / THE OPENING BELL

Your first investment decisions.

Form your team and agree responsibilities

Understand your client and their objectives

Research investments and test the evidence

Build a portfolio and manage risk

Watch market prices, news and events

Review performance and explain your choices

EXPERIENCE. JUDGEMENT. OPPORTUNITY.

01 / OUR PURPOSE

Finance should be for everyone.

Open doors to financial careers

Widen access and improve diversity

Learn by doing, not just listening

Encourage responsible investing

Put education before profit

02 / YOUR OPPORTUNITY

Think like an investor.

Understand markets and their history

Research evidence and challenge assumptions

Make decisions and manage risk

Collaborate, communicate and lead

Use technology with sound judgement

EXPERIENCE. JUDGEMENT. OPPORTUNITY.



MARC DUSCHENES

BA Accounting and Finance, Leeds

ANALYST / DEALMAKER / ENTREPRENEUR / INVESTOR
EDUCATOR / OUTDOOR PROFESSIONAL & RESPONDER

01 / THE CITY

Research. Markets. Trading.

From using a school payphone and Teletext to learn to trade at 15 after the Big Bang, and being a runner on the Manchester Stock Exchange, to becoming a City director at 26. His prolific, ground-breaking research helped shape investment behaviour, regulation and M&A. He then chose to leave the City to found a fund management firm, returning to the public markets through a series of pioneering reverse takeovers.

INSTITUTIONAL CAREER

BARCLAYS DE ZOETE WEDD
VP Equity Research, Small Cap and Retail
NATWEST MARKETS / DEUTSCHE BANK
Assistant Director, Retail Equity Research
DRESDNER KLEINWORT BENSON
Director, Sales and Trading Desk

RESEARCH & DEALS

TOP THREE UK ANALYST
Reuters and Extel surveys
RETAIL & CONSUMER SECTORS
Research informing investors and transactions
WALMART, TESCO, SOMERFIELD
Broker to retailers; $100m/day trading desk

02 / THE BOARDROOM

Founder. Dealmaker. Chairman. CEO.

Founded Braemar Group plc in 2001; led its AIM listing at 29 in 2005.
Subsequently led listed funds, acquisitions and the sale to Brooks Macdonald plc.

PUBLIC MARKETS

2005 BRAEMAR GROUP PLC
AIM reverse takeover of Metro Capital
2007 REGENESIS GROUP PLC
Chairman; AIM re-admission
2008 PINE VENTURES PLC

CHANNEL ISLANDS STOCK EXCHANGE
Three New Fund Listings in 2 years
Braemar investor: Vincent Tchenguiz.

PRIVATE INVESTMENTS & FUNDS

2001 BRAEMAR GROUP PLC
Founded as a property investment and fund manager
2007 OVER 2,500 PROPERTIES
Property portfolio under management
2010 BROOKS MACDONALD PLC
Braemar sale; CEO, Securities
2011 BAYFIELD CAPITAL
Management buyout of residential fund operations
Other ventures: Beetham Tower, Yogberries, Pro Spin.

From City director at 26 and listed-company chief executive at 29, Marc went on to build and sell investment businesses before focusing on financial education, Holocaust learning, outdoor leadership and community fundraising, raising hundreds of thousands of pounds for charity and education.

The common thread is judgement under pressure, practical learning and a commitment to compassion.

03 / BEYOND FINANCE



JUNIOR TRADER

FOUNDER | 2008

Founded in 2008, Junior Trader introduces students to investment research, portfolio decisions and risk. Its Christmas challenge examines food, fashion and online retail companies.

Teams, individual entrants and teacher-led learning; finance walks in London and Manchester.

junior-trader.org



REGENESIS

FOUNDER | OUTDOOR EDUCATION

Family history at Terezín informs Regenesis, connecting Holocaust history, displacement and refuge with outdoor experiential education. The programme draws on the Windermere Children.

The Windermere Protocol and Nine Principles of Outdoor Harmonic Learning guide delivery.

regenesis.org.uk



OUTDOOR LEADERSHIP

MOUNTAIN TRAINING LEADER | SEARCH & RESCUE TEAM EMERGENCY RESPONDER (FREC 3)

Search and Rescue team member and qualified Mountain Training Lowland Leader; FREC 3 emergency responder, applying risk assessment, sound judgement and compassion in the field.

Also founded Giant Walk CIC, supporting charities through public and corporate walking events.

giantwalk.org

RECOGNITION IoD Young Director Runner-Up (2008) | EN Young Entrepreneur (2009)

Insider Young Professional (2010) | pro-manchester NW Entrepreneur (2010) | 42 Under 42

LINKEDIN / MARC DUSCHENES

01 / IN THE CITY

Your career in finance partner

Introduction

Hobby trading during Big Bang

Career journey

Testing new systems

Broker to Tesco, Wal-Mart/Asda, Somerfield

Top 3 ranked by Reuters/Extel UK and EU

Hedge Fund Desk pioneer

02 / IN THE BOARDROOM

From start-up to listed company

Formed a start-up fund management company

£1bn under management

3 years to IPO; became small plc CEO

3 further reverse takeovers, 3 fund IPOs

Exited

Non-exec and seed investor

Frozen yoghurt, spinning, property

EXPERIENCE. JUDGEMENT. OPPORTUNITY.

THE JUNIOR TRADER PATHWAY

Experience. Judgement. Opportunity.

1

EXPLORE

Finance Walking Tours

Take students into the heart of the City or Manchester's business districts to connect what they learn with the institutions, markets and people behind finance.

2

EXPERIENCE

Junior Trader Investment Challenge

Students act as an investment team, making decisions around research, portfolio construction, trading, risk and presenting their thinking. It develops commercial awareness, judgement and teamwork.

3

DEVELOP

JT Integrated

A wider school enrichment programme that brings Junior Trader into a school setting over a longer period, combining the competition with structured learning, finance skills, career insight and practical development.

4

PROGRESS

JT+

An individual development and certification pathway that goes deeper into personal feedback, investment thinking, leadership, governance and the behaviours needed by future finance professionals.

01 / FOUNDATIONS

Build your knowledge.

- Introduction and finance walking tour
- Skills audit and baseline personal statement
- Junior Trader Jargon Buster
- Markets and listed companies
- Research, risk and investment judgement

02 / INVESTMENT CHALLENGE

Put knowledge into practice.

- Research listed retail companies
- Construct and justify a portfolio
- Balance risk and potential return
- Monitor market news and review decisions
- Produce a four-page investment report

03 / JUNIOR TRADER PLUS

Develop your judgement.

- Three investor meeting exercises
- Governance and ethical decisions
- Personal investment philosophy
- Reflective log and personal statement
- Assessment and feedback

EXPERIENCE. JUDGEMENT. OPPORTUNITY.

THE CHALLENGE JOURNEY

Junior Trader Investment Challenge

1

GET STARTED

Read the brief
and rules

2

RESEARCH YOUR INVESTMENTS

Explore assets
and evidence

3

BUILD YOUR PORTFOLIO

Choose investments
and allocations

4

SUBMIT YOUR PORTFOLIO

Check carefully
then submit once

5

REVIEW AND REPORT

Explain your choices
and review performance

6

RESULTS AND ACHIEVEMENT

Reflect on feedback
and recognise progress

THE CLIENT

A 31-year-old professional female footballer with a medium-low risk profile. Use her festive retail insight to build a portfolio.

THE TEAM

Teams of 1–3 traders. Register a unique team name inspired by a global financial institution and your school.

THE PLATFORM

Trade at www.junior-trader.com in the Dealing Room (password required).

THE DEALING DAY

One shot only: Thursday 17 December 2026 (before 4:30pm). No edits. No corrections. Keep a record just in case!

PORTFOLIO RULES

Choose one security from each category: Fashion, Food, Online Retailer (UK & European), Index, Commodity, Currency and Cash. Allocate 10–25% per asset. Total 100%.

THE STRATEGY

Build a thematic portfolio (e.g. festive retail, inflation, supply chain, online shopping or market sentiment). Political forecasting is forbidden.

THE REPORT

A team report of at least 4 pages, explaining your theme, allocation, decisions and performance.

THE RESULTS

Scoring: 50% Written Report, 50% Trading Performance. Beat Chat GPT & Claude ("Beat the Machine") or Marc's Portfolio ("Beat the Expert"). Beat both to be Master Trader – 2026/27 Grand Champion.

KEY DATES

DEALING SUBMISSIONS	AUTOMATIC LIQUIDATION	PRELIMINARY RESULTS	REPORT SUBMISSION	FINAL RESULTS
THU 17 DEC 2026	MON 11 JAN 2027	FRI 15 JAN 2027	FRI 5 FEB 2027	MON 1 MAR 2027

01 / EXPLORE

Build your knowledge.

- Explore resources and quizzes
- Learn the jargon and rules
- Understand your client
- Research companies and sectors
- Use AI to learn, not to decide
- Share knowledge with your team

02 / PLAN

Build a balanced portfolio.

- Download and test the planner
- Discuss portfolio weightings
- Balance risk and return
- Challenge each other’s thinking
- Agree your investment rationale

03 / DEAL

Make informed decisions.

- Follow markets and company news
- Consider politics and economics
- Observe consumer behaviour
- Revisit your assumptions
- Agree and check your portfolio
- Submit once only. Keep a record.

EXPERIENCE. JUDGEMENT. OPPORTUNITY.

01 / YOUR NEXT OPPORTUNITIES

Build on your experience.

Career advice and CV development

Continued mentoring and further learning

Networking with Junior Trader alumni

Internships and job opportunities

Develop and share thought leadership

02 / STAY CONNECTED

Turn learning into opportunity.

Keep in touch and follow Junior Trader

Explore internship opportunities

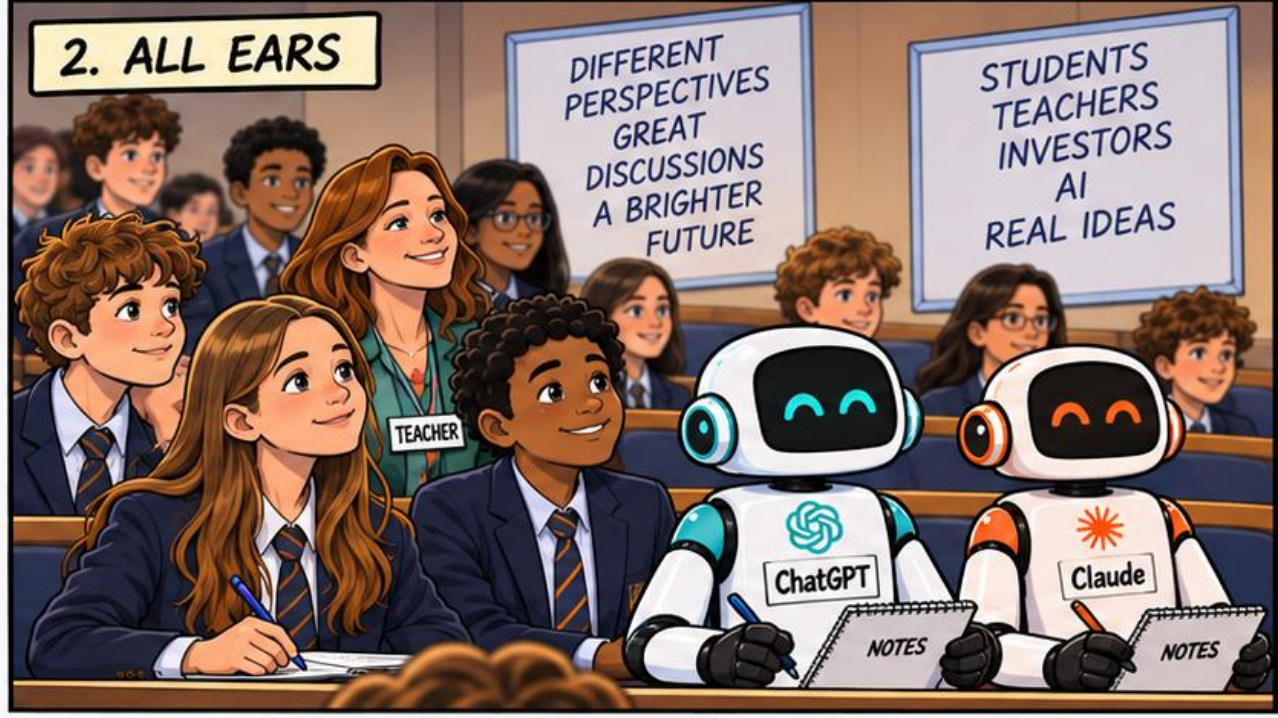
Prepare for interviews

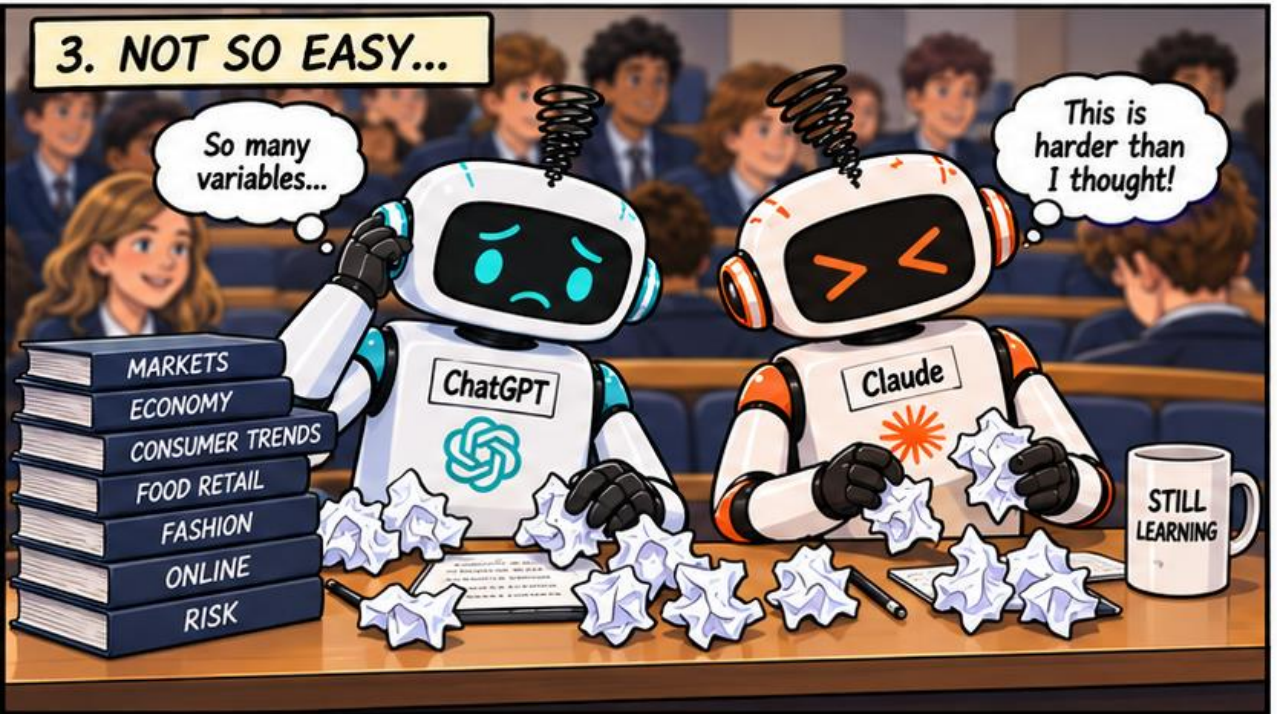
Refer back to your Junior Trader work

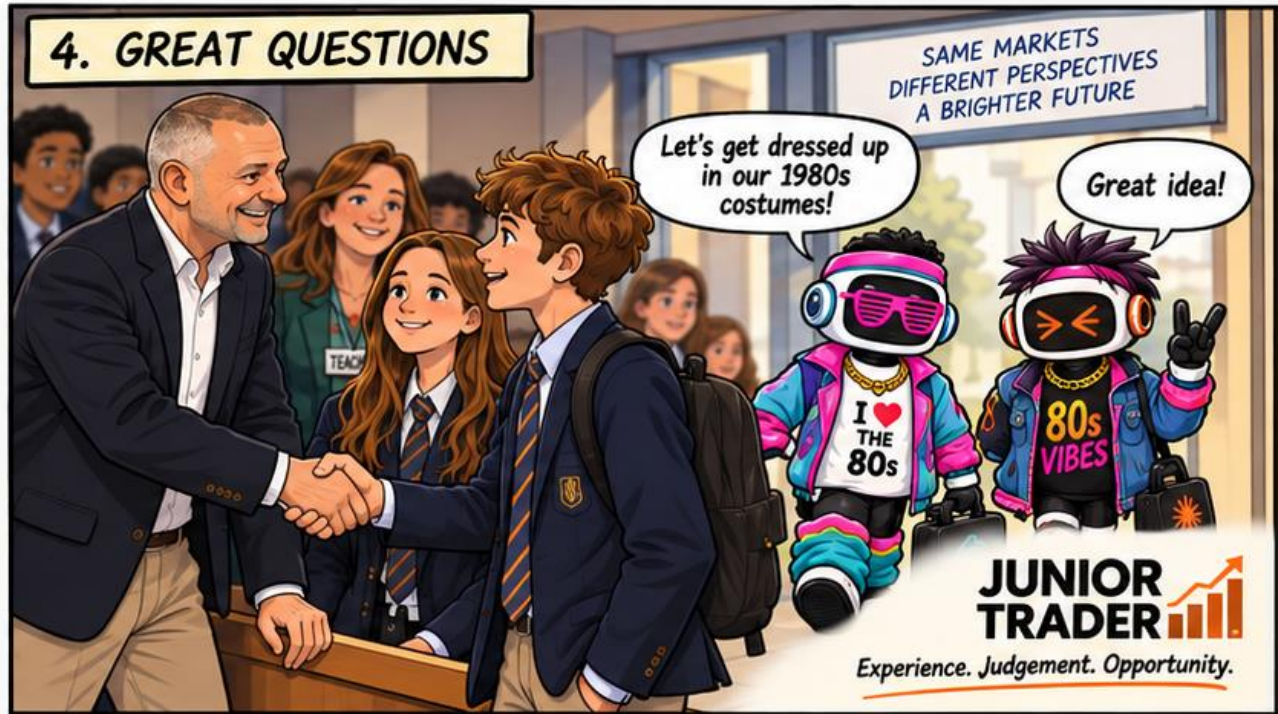
Connect schools and employers

EXPERIENCE. JUDGEMENT. OPPORTUNITY.


1. LET'S GET TALKING ABOUT INVESTING
CURIOSITY
JUDGEMENT
TEAMWORK
COMMERCIAL AWARENESS
OPPORTUNITY
JUNIOR TRADER
Let's get talking about investing
• Real companies
• Real decisions
• Real world
• Real skills
#TradeSafe


2. ALL EARS
DIFFERENT PERSPECTIVES GREAT DISCUSSIONS A BRIGHTER FUTURE
STUDENTS TEACHERS INVESTORS AI REAL IDEAS
TEACHER
ChatGPT
Claude
NOTES
NOTES


3. NOT SO EASY...
So many variables...
This is harder than I thought!
ChatGPT
Claude
MARKETS
ECONOMY
CONSUMER TRENDS
FOOD RETAIL
FASHION
ONLINE
RISK
STILL LEARNING


4. GREAT QUESTIONS
SAME MARKETS
DIFFERENT PERSPECTIVES
A BRIGHTER FUTURE
Let's get dressed up in our 1980s costumes!
Great idea!
I ♥ THE 80s
80s VIBES
JUNIOR TRADER
Experience. Judgement. Opportunity.

01 / SUMMARY

You have learned.

About companies and markets

How to approach getting started

How to use your skills, including AI

What lies ahead

02 / ACTION POINTS

Prepare for the challenge.

Form diverse teams and work together

Choose a team name, not roles

Complete any preparatory learning

Prepare for the Investment Challenge

Research your investments

Follow your picks and the market

EXPERIENCE. JUDGEMENT. OPPORTUNITY.

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