Submission Guide

Investment Challenge 2026/27 | Portfolio and Investment Report

1. What You Submit

You upload two files to the Dealing Room during the competition. Both go in under your team name.

What	When	File
Your completed Portfolio Planner	Before 4.30 pm UK time on Thursday 17 December 2026	Excel spreadsheet (.xlsx)
Your Investment Report	By Friday 19 February 2027	One file, at least 4 pages

2. Key Dates

Stage	Date
Portfolio upload	Thursday 17 December 2026, before 4.30 pm UK time
Automatic liquidation	Monday 11 January 2027
Preliminary Results	Friday 15 January 2027
Report upload	Friday 19 February 2027
Final Results	Monday 1 March 2027

3. Name Your Files

Save both files with your team name, exactly as you registered it. Use capital letters and a hyphen, with no spaces.

Entry	Portfolio Planner	Investment Report
School team	MGS-BARCLAYS.xlsx	MGS-BARCLAYS
Individual	SMITH-BARCLAYS.xlsx	SMITH-BARCLAYS

A file with the wrong name may not be matched to your team. Check it before you upload.

4. Submitting Your Portfolio

Your portfolio is the Portfolio Planner spreadsheet. Uploading it is your one and only trade.

1. Complete every yellow cell in the Planner. Leave the white cells blank.
2. Check the allocations. Each security takes between 1% and 20%. You may hold up to 10% in cash. Your allocations, including any cash, must add up to 100%.
3. Check the “Ready to submit?” box at the bottom of the sheet says READY TO SUBMIT.
4. Fill in the date and time you are uploading it.
5. Save the file with your team name, for example MGS-BARCLAYS.xlsx.
6. Log into the Dealing Room at www.junior-trader.org with the password **#TradeSafe**. Do not share it outside your school.
7. Upload the spreadsheet once, before 4.30 pm UK time on Thursday 17 December 2026.
8. Keep a copy of the file you uploaded. Keep a record just in case!

Once you upload, your trades and prices are locked in. You cannot deal again during the competition. If your total is below 100%, you forfeit the difference. If it is above 100%, the excess is deducted from your portfolio.

5. Submitting Your Investment Report

1. Write a report of at least 4 pages. The Report Student Guide explains what to include and how it is judged.
2. Add the AI declaration at the end. Every team member writes one line: either “I used AI for…” or “I did not use AI”.
3. Every team member who contributed signs the report.

4. Save the report as one file with your team name, for example MGS-BARCLAYS.
5. Log into the Dealing Room at www.junior-trader.org with the password **#TradeSafe**.
6. Upload your report by Friday 19 February 2027.
7. Keep a copy of the file you uploaded.

6. Before You Upload: Checklist

Portfolio Planner:

• Team name, school and pupil names filled in
• One pick in every category, cash optional
• Each security 1% to 20%, cash up to 10%
• Total exactly 100%
• Sheet says READY TO SUBMIT
• Saved with your team name
• Uploaded before 4.30 pm UK time on Thursday 17 December 2026

Investment Report:

• At least 4 pages
• AI declaration completed by everyone
• Signed by everyone who contributed
• Saved as one file with your team name
• Uploaded by Friday 19 February 2027

7. Problems Uploading?

Tell your teacher straight away, and well before the deadline. Do not contact Junior Trader from a personal email account. Your teacher will contact us from a school email address.

Individual entrants should contact Junior Trader from a school email address.