Participant Quick-Start Guide

Junior Trader Investment Challenge | 2026/27

1. Get started

Take part individually or in a team of up to three. Your team name is your school (or surname) and bank, for example MGS-BARCLAYS or SMITH-BARCLAYS. Read the client scenario and the rules for your entry, and note the deadlines below.

2. Research your investments

Use the Asset and Ticker List, the jargon guides and the research resources on the Challenge page. Develop your theme and keep dated sources and notes explaining your thinking.

3. Build your portfolio

Fill in the Portfolio Planner. Put between 1% and 20% into each security. You may hold up to 10% in cash. Your allocations, including any cash, must add up to exactly 100%. Think about the client, the risks and how your choices work together.

4. Upload once

Save your Planner with your team name and upload it in the Dealing Room before 4.30 pm UK time on Thursday 17 December 2026, using the Dealing Room password you have been given. Check every selection first. Once you upload, your trades and prices are locked in. Keep a record just in case!

5. Follow and review

Follow relevant prices and news after you upload. Your portfolio stays fixed and is liquidated automatically. Use the preliminary results to compare what happened with your original reasoning.

6. Complete your Investment Report

Write a report of at least 4 pages explaining your theme, choices, allocations and performance, using evidence. Name everyone who contributed. Save it with your team name and upload it in the Dealing Room by Friday 19 February 2027. The Investment Report Guide and Submission Guide explain how.

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
Investment Report upload	Friday 19 February 2027
Final results	Monday 1 March 2027

Trading performance and the written report each count for 50% of the final score. This guide is a summary: read the full rules. The launch lecture will explain the Challenge in more detail.