Teacher Guide

Investment Challenge 2026/27

Purpose of the Competition

This guide supports teachers running the Junior Trader competition. It explains timelines, expectations, supervision points, and how to help students complete their portfolios and reports independently.

Key Dates

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

Getting Started (Teacher Overview)

Junior Trader is a team-based investment simulation. Students work collaboratively but must demonstrate individual understanding and contribution.

Student Executive Summary (Embedded)

Junior Trader is about learning how real investment decisions are made. You will research, discuss, choose a balanced portfolio once, and explain your reasoning clearly. There is no perfect portfolio – only well-explained ones.

Entering the Dealing Room

The Dealing Room is a one-time decision. Students should research first, agree as a team, and submit once. Allocations must total 100 percent.

When to Pick Trades

Encourage students not to rush. Discussion and reflection are part of professional investing.

Balancing the Portfolio

Students should consider diversification, risk, seasonality, and the client profile. Reasoned balance matters more than outcomes.

Report Writing Guidance

Reports must answer the question: why this portfolio for this client? Description alone is not enough.

Teacher Boundaries

Teachers may explain terminology and structure but must not influence asset choices.

Academic Integrity

AI may support grammar and definitions only. Portfolio thinking and justification must be the students' own work.

Classroom Checklist

Before Submission:

- Team confirmed
- Research completed
- Allocations total 100%
- Portfolio submitted once

Before Report Submission:

- Portfolio and report align
- Evidence cited
- Risks acknowledged
- All students contributed

Additional Resources and Progression Pathway

To support both teachers and students, Junior Trader has added a growing set of learning resources available via the website and directly within the Dealing Room. These are designed to support understanding, not to provide answers.

Available resources include:

- a retail sector case study to support applied analysis
- multiple jargon busters covering trading, markets, and retail language
- a Junior Trader PowerPoint introducing valuation concepts and investment thinking

Teachers may direct students to these materials as part of structured learning or independent research, but should not use them to steer portfolio choices.

Progression to JT+

Junior Trader also acts as a pathway into JT+, our next-stage programme for older students and alumni who want to develop deeper investment thinking. JT+ moves beyond trading simulation into ethics, governance, sustainability, valuation, and real-world investment decision-making.

Participation in Junior Trader helps students build the confidence, language, and foundational understanding required to progress naturally into JT+ when ready.

Safeguarding and Communications

Junior Trader takes safeguarding seriously and works through schools at all times.

Students should not contact Junior Trader directly using personal email accounts. All communication with Junior Trader must be made via a recognised school email address and, where appropriate, by a teacher or member of school staff.

Students are very welcome to follow Junior Trader on LinkedIn to see updates, articles, and educational content about markets, careers, and progression routes. LinkedIn is used for public-facing information only and is not a channel for individual student communication.

Junior Trader on LinkedIn: https://www.linkedin.com/company/junior-trader