

GROWING
FUTURE
ASSETS
INVESTMENT COMPETITION



**COMPETITION
TOP TIPS**

BEFORE THE COMPETITION STARTS INTRODUCTION WEEK

Your aim in pitching a company to our panel of judges is to convince them that this is a great long-term investment - a company that is going to grow over the next 5-10 years and become more profitable.

If you invested in real life, your investment would increase in value because either:

- the company might pay a dividend – a share of the profits, or
- your shares would go up in price and you could sell them and make a profit, or
- both!

In this way, investors make more money than they would if they put their money into a savings account.

Teams need to make the case for investing in their chosen company in:

- a written Research Report addressing 7 questions
- a 3-minute Elevator Pitch video.

This booklet gives you some hints and tips to help you make the best pitch you can. We've also included:

- some exercises you might want to try
- links to our video Masterclasses, on the **Competition Masterclasses** page of the Future Asset website. These are presented by Investment Managers and give extra advice and guidance to help you with your task.

Future Asset online

A great source of investment and competition information.

www.futureasset.org.uk

WANT TO WORK WEEK BY WEEK? HERE IS A GUIDE...

-
- 18 September **Build your team** and contact your Competition Coach!
 - 25 September **Choose your company** and start your research plan
 - 2 October **Start your research!** Company profile & SWOT
 - 9 October **Research report: SWOT** and gather information for Future growth & ESG
 - 30 October **Research report: Finance & Share Price Chart** Read Annual Report
 - 6 November **Research report: ESG & Future growth**
 - 13 November **Research report: Future growth** Key points for investment case and practice elevator pitch
 - 20 November **Finalise key arguments** and record elevator pitch video
 - 27 November **Deadline Week** Edit elevator pitch video and proof read report submission

BEFORE THE COMPETITION STARTS GET UP TO SPEED WITH INVESTMENT MANAGEMENT

Before you start on your research:

- Look through the Introduction to Investment Management booklet
- Watch Masterclass 1: Introduction to Investment
- Watch Real People in Investment videos

This will help you understand more about investing and your competition task.

If you have any questions, you can contact the Future Asset team at info@futureasset.org.uk or ask your Investment Mentor in your first meeting.



**INTRODUCTION
TO INVESTMENT
MANAGEMENT**



**WATCH
MASTERCLASS 1:
INTRODUCTION TO
INVESTMENT**



**WATCH 'REAL PEOPLE
IN INVESTMENT'**



**BUILD YOUR TEAM AND
CONTACT YOUR COMPETITION COACH!**

You might know your team members, or they might be people you've never worked with before, but you're all going to achieve something together.

Your first task is to get to know your team members!

**EXERCISE: TEAM GOALS, STRENGTHS
AND AIMS!**

Answer the following questions for yourself and then share them with you team.

1. If I had a million pounds, this is what I would do with it...

2. In 10 years time, I would like to be...
(Go wild, no one is going to hold you to it!)

3. I am taking part in the competition because...

4. My main strengths are / what I can bring to the team...

(this can be anything you think you'd be good at or would like to try)

5. What I hope to get from taking part in the competition...

(this could be skills, experiences, information, anything else you want to get)

6. Set a goal for something you'd like to achieve by taking part in the competition...

BUILD YOUR TEAM AND CONTACT YOUR COMPETITION COACH!

EXERCISE: SELLING A PRODUCT

Your company must sell its product or service, and your team has to “sell” your chosen company to the judges in your investment pitch.

Ask your teacher to get some random objects for you to ‘sell’. It can be anything! We used a scented candle, a donkey keyring and some chopsticks.

- On your own or in teams you have two minutes to think of as many reasons as you can that someone should buy the product.
- You then each have 30 seconds to convince everyone else to buy your product.
- When everyone has “pitched” their item, decide who made the best case and which product you would buy. You can decide this individually and then as a group.

What did you like about the winning pitch? Why did they convince you to buy it? Did the “pitcher” use any arguments or techniques you thought were particularly useful?

JOBS FOR THE GIRLS!

Give each team member a different responsibility and area to lead on depending on their interests, skills, and strengths.

- **Head for figures?** You could lead on researching the financial facts and producing and interpreting a company share price chart
- **Debater?** Your skills in lateral thinking and considering all the pros and cons for the SWOT chart would be ideal. You need to consider all sides of the argument and make sure your case is thorough and balanced.
- **Eco-champ or social warrior?** Looking into ESG - Environmental, Social and Governance policies and activities - would be right up your street.
- **Budding Writer?** Use your skills to present your team’s argument in a concise and persuasive case.
- **Gift of the Gab?** With your way with words, leading the Elevator Pitch video might suit you.
- **Tik-tokker?** You would be ideal to produce a creative and convincing Elevator Pitch Video

FACT: TEAMS THAT WORK WITH THEIR COMPETITION COACH PRODUCE BETTER PITCHES!

Working with your Competition Coach, asking them questions about anything you’re unsure about, and getting their feedback on your ideas, helps you to make a better pitch. It also gives you a real insight into working in investment management and experience to put on your CV, job and college applications.

Coaches are awesome volunteers who give their time to help teams understand more about investment, get insights into the industry and produce the best Research Report and Elevator Pitch Video that you can. That increases your chance of winning too!

We will let you know who your Competition Coach is by the start of the competition on 19th September.

As soon as you get their details, get in touch! They’re all really nice people who are keen to help.

- Plan to meet your coach about **4 times** over the course of the competition
- Coaches are busy people so it might be best to plan some meeting dates for the whole of the competition e.g.: 25 September, 9 October, 6 November and 20 November. That way, you have a clear plan to work to.
- Set and **share an agenda for each meeting** so everyone knows what you’ll be discussing and what needs to be done.
- You can **meet your Competition Coach online** via Microsoft Teams, Google Meet or another platform that suits you all, or if they are local, you could even meet in person, though that’s not always possible.
- You can contact them in other ways too, such as emails or phone calls. It’s all **great practice in working with a professional** and using work-style communications.

Sometimes plans change and that’s fine.

Make sure you communicate any changes to your team members, teacher and Competition Coach in good time!

A HANDY EMAIL TEMPLATE

Copy and paste, or adapt, this email to get started

(Remember to copy your Teacher Champion into the email so they're in the loop).

Dear [Competition Coach name]

We are [name], [name], [name] and [name] from [School Name]! Our Teacher Champion is [Teacher name]. Thanks very much for being our Competition Coach. We've chosen a team name and it is [xxxxxxx].

We're looking forward to getting started and we want to WIN! Can you let us know when would suit you best for an initial online meeting? We're available at the following times:

[Date / time]

[Date / time]

[Date / time]

In school we can use Microsoft Teams / Google Meet – does that work for you?

Thanks again and we look forward to hearing from you.

With best regards,

[name], [name], [name] and [name]

Team [team name]

CHOOSE YOUR COMPANY

The companies you can pitch are listed in the Companies Crib Sheet.

For each company we have given you:

- A company descriptor
- Links to their main and Investor Relations websites
- Three investment pros and cons to get you started.

Everyone should read through the companies on the Crib Sheet and choose their top three. You can then discuss your individual preferences as a team and make your group choice!

You may want to discuss your choices with your Competition Coach, but ultimately, the company you decide to pitch is up to the team. You are the ones doing the work.

If you really can't decide which company to choose, you could start your research on more than one, but you might find you waste valuable time.

There are some tables below to help you make your company choice.



Competition Crib Sheet is in the Useful documents section on the FA website.

	Member 1	Member 2	Member 3	Member 4	Member 5	Member 6
1st choice company						
2nd choice company						
3rd choice company						

EXERCISE: COMPANY CHOICE 1

Each team member should have picked their three favourite companies. Fill in the chart and see if there are any companies you agree on:

EXERCISE: COMPANY CHOICE 2

Once you've narrowed down your selection of companies, you could draw up a list of pros and cons for each one. Once you have made a list of pros and cons, you could vote on which company to choose.

Shortlist	Pros	Cons	Votes
Company 1:			
Company 2:			
Company 3:			

PROPER PRIOR PLANNING FOR PERFECT PERFORMANCE

You have a total of 10 weeks to complete the competition tasks if you include the October Break, 8 or 9 weeks if you're having a rest!

However, that time can go quite quickly, especially when you have other schoolwork to do, so having a plan is useful to make sure you complete everything in time.

Here's a sample competition plan. Why not adapt this for your team? You can adapt it as you go along, and remember, you're doing this as a team so share the tasks out between all of you!



DOWNLOAD A FILL-YOUR-OWN PLANNER

Competition planner is in the Competition Downloads section on the FA website.

Week commencing	Meeting date, time & location	Topics & Tasks	Outside meeting / Own research
11 September Intro week	Tuesday, 1-1.40pm Ms Jones' Classroom	<ul style="list-style-type: none"> Watch Masterclasses: Intro to Investment & Mindset Team Building exercise Plan meeting dates and put in planner & phone! 	<ul style="list-style-type: none"> Read What is Investment Management? & watch Real People in Investment videos Read Research Report questions & Companies Crib Sheet
	Thursday, 4-4.30pm Library	<ul style="list-style-type: none"> Meet librarian to show how to access Financial Times & websites for research 	Junior and Senior Research reports are available on the FA website.
18 September Comp Week 1	Tuesday, 1-1.40	<ul style="list-style-type: none"> Watch Masterclass: Researching a Company Discuss company choice – who likes what? Email Competition Coach with possible meeting dates and times 	<ul style="list-style-type: none"> Look out for email reply from your coach and confirm dates Look into some companies we like to help make decision
	Thursday, 1-1.30	<ul style="list-style-type: none"> Decide team members to lead on different areas: finance, ESG, video production Discuss company choice – can you narrow it down? Prepare for 1st Coach Meeting! Watch Masterclass: Body Language as this could be useful! 	

PROPER PRIOR PLANNING FOR PERFECT PERFORMANCE

Week commencing	Meeting date, time & location	Topics & Tasks	Outside meeting / Own research
25 September Comp Week 2	Tuesday, 1-1.40	Coach Meeting 1: Online <ul style="list-style-type: none"> Introduce ourselves, ask about them, discuss company choice and where to start research Agree on company to pitch Fill out Competition plan 	Research for Q2: Company Profile Q3: SWOT Analysis
	Thursday, 1-1.30	<ul style="list-style-type: none"> Agree how best to share info amongst team. All work on Google doc? Start research! Agree who will look for what info / look at what source. 	
Week commencing	Meeting date, time & location	Topics & Tasks	Outside meeting / Own research
2 October Comp Week 3	Tuesday, 1-1.40	<ul style="list-style-type: none"> Use research to start filling in Q2: Company Profile & Q3: SWOT Analysis Make notes for other questions when you find that information 	<ul style="list-style-type: none"> Watch Masterclass: Speech More company research for Company Profile & SWOT. Look at sector and competitors so you can compare. Please see your teacher for access to Speech video content.
9 October Comp Week 4	Tuesday, 1-1.30	<ul style="list-style-type: none"> Complete Q2: Company Profile & Q3: SWOT Analysis Watch Masterclass: Share Price Chart & Financial Facts 	<ul style="list-style-type: none"> Have a go at getting a company Share Price Chart on Yahoo Finance website (Q5) Find company's most recent Annual Report and the accounts pages & sales figures (Q4) Share out some websites to look at over the October break. Watch Masterclass: ESG
	Thursday, 1-1.30	Coach meeting 2: Online <ul style="list-style-type: none"> Tell / show mentor your work so far. Ask questions about Q4: Financial Facts and what Q5: Share price chart shows Make notes! 	
16 October Comp week 4 [Oct Break] 23 October Comp Week 4 [Oct Break]			
30 October Comp Week 5	Tuesday, 1-1.40	<ul style="list-style-type: none"> Fill in Q4: Financial facts & Q5: Share Price Chart and email teacher & Coach for them to check it if you're unsure! Discuss ESG 	Watch Masterclass: Looking for Growth (or listen to it like a podcast) Research for <ul style="list-style-type: none"> Q6: ESG: Environmental, Social & Governance Q7: Growth – Looking Forward

PROPER PRIOR PLANNING FOR PERFECT PERFORMANCE

Week commencing	Meeting date, time & location	Topics & Tasks	Outside meeting / Own research
6 November Comp Week 6	Tuesday, 1-1.30	<ul style="list-style-type: none"> Complete Q6: ESG making sure you cover all areas: Environmental, Social and Governance Discuss ideas for Elevator Pitch Video 	<ul style="list-style-type: none"> Watch Masterclass: Voice Think about how your company will grow (Q7) and evidence to support your case. Draft answer Q1: Investment Case <p>Please see your teacher for access to Voice video content.</p>
	Thursday, 1-1.40	Coach meeting 3: in person (if possible) <ul style="list-style-type: none"> Discuss your ideas for Q7: Growth- Looking Forward, and your key investment arguments for Q1: Investment Case 	
13 November Comp Week 7	Tuesday, 1-1.40	<ul style="list-style-type: none"> Complete Q7: Growth – Looking Forward Agree key points for Q1: Investment Case 	<ul style="list-style-type: none"> Watch Masterclass: Tips for Video Recording Draft Elevator Pitch 'script' Consider points for Q8: Other important info Collate Research Sources for end of Research Report
	Thursday, 1-1.30	<ul style="list-style-type: none"> Try out Elevator Pitch video Send final draft of Research Report to Coach for comment 	
20 November Comp Week 8	Tuesday, 1-1.40	Coach meeting 4: online <ul style="list-style-type: none"> Get Coaches feedback, give them a preview of your Elevator Pitch! 	<ul style="list-style-type: none"> Finalise Research Report and make sure all team happy with it. Spell and grammar check Research Report. Ask someone to proof-read it!
	Thursday, 1-1.30	<ul style="list-style-type: none"> Record Elevator Pitch video 	
27 November Deadline week!		<ul style="list-style-type: none"> Edit Elevator Pitch Video Send in your Research Report & Elevator Pitch Video Send a copy to your Competition Coach and send them a thank you email for helping you! CELEBRATE!! 	<ul style="list-style-type: none"> You could write an article for the school newsletter or website on your amazing achievement. If you are 16 years old or over, you could join LinkedIn and follow Future Asset and link up with your Mentor.
Friday 1 December COMPETITION DEADLINE			

Our Future Asset Judges will be working over December and January to review all your reports and videos and we will be in touch with details of our Junior and Senior Finalists in January.
Good luck!

MAKE YOUR MARK WITH SUSAN ROOM

Future Asset is delighted to be working with Voice and Executive Coach Susan Room, offering the expertise she provides to professionals to school students.

Susan has recorded special Masterclasses for our competition teams based on her Make Your Mark with Susan Room® coaching programme and toolkit.

The programme is based on the idea that how you think affects how you look, what you say, and how you say it.

The four Masterclasses on Mindset, Body Language, Speech and Voice combine Susan's expertise in voice and executive coaching to give girls the confidence, presence and communication skills to speak up and make their unique mark on the world.

Make Your Mark Masterclass videos are only available for competition team members and their Teacher Champions. Future Asset will email links to each Masterclass as they are released.

If you haven't received your link, email us at info@futureasset.org.uk



VISIT SUSAN
ROOM'S WEBSITE

In the first of four "Make Your Mark" videos, Executive and Voice Coach, Susan Room, helps you to develop a positive mindset and combat your inner critic so you can take part in the Growing Future Assets Competition with confidence. Please see your teacher for access to Susan's video content.

TO 'MAKE YOUR MARK' IS TO DO SOMETHING THAT IS MEANINGFUL AND IMPORTANT. SOMETHING THAT HAS A LASTING IMPACT ON THE WORLD. ON YOU. ON OTHERS.

EVERYONE IS CAPABLE OF MAKING THEIR MARK. YET MANY DON'T: PERHAPS BECAUSE THEY LACK CONFIDENCE OR FIND IT HARD TO MAKE THEIR PRESENCE FELT.

OR PERHAPS BECAUSE FOR SOME REASON THEY FEEL UNABLE TO SPEAK UP; OR DON'T LIKE THE SOUND OF THEIR VOICE WHEN THEY DO.

Susan Room, Voice and Executive Coach

QUESTION 1: INVESTMENT CASE RESEARCH REPORT

WHY DO YOU THINK THIS COMPANY IS A GOOD LONG-TERM INVESTMENT?

This is where you put your strongest and most persuasive arguments for investing in your chosen company. It is the fruition of all of your research and analysis so you probably want to **do this last after you've completed the other parts of the report.**

You have to answer this question in 500 words (Senior category) or 400 words (Junior category) so this needs to be concise and to the point:

- Decide your strongest arguments for investing in your company and focus on them.
- What makes the company stand out from its competitors and why is it better?
- Why do you believe it will be successful in the future and what is your evidence for that?
- What makes your team passionate about this company, the products or services it provides, the gap in the market it fills or the problem it solves?

EXERCISE: WHAT IF IT WAS YOUR MONEY?

Imagine you were investing your own money in a company. What would you want to know before you parted with your cash?

- *
- *
- *
- *

Can you answer these questions about the company you're pitching?

THE FINAL EDIT

Editing is vital. Choose your words carefully, cut out any extra padding, and keep to the point. You might need to re-edit your investment case a few times before you're happy with it.

Show your investment case to your Investment Mentor along with the rest of your Research Report and Elevator Pitch Video. They know a good investment pitch when they see one, and can give you valuable feedback and suggestions.

Grammar and spelling are very important in the workplace. Make extra sure you spell check, and sense check your Research Report before you submit it!

It shows you care about your work and have great attention to detail.

Q1: INVESTMENT CASE (500 WORDS MAXIMUM)

Why do you think this company is a good long-term investment?



WATCH 'MAKE
YOUR MARK: BODY
LANGUAGE'

In the second "Make Your Mark" video, Susan gives great advice on open body language and how it can help you look and feel more confident when delivering your investment pitch, giving a presentation in class or in an interview for a job or college place. Please see your teacher for access to Susan's video content.

To pitch a company convincingly, you need to really understand how the business makes money, so this is the question to start with!

Deep dive into the main company website, Investor Relations website, and Annual Report at the start, and then expand your research into articles and reports about the company and the sector they work in.

As well as the company, you need to know about the sector they operate in –what’s new in the field, where might it develop in the future, who are your company’s competitors, and why will your company do better than them?

Google is your friend (other search engines are available), but make sure that the source of your information is reputable and reliable. There is a list of reliable sources at the back of the Company Crib Sheet.

WHAT'S IN A COMPANY'S ANNUAL REPORT?

Whilst you get a school report every year (or maybe more than once a year), companies have to publish their own “Annual Report”, telling shareholders about their operations and finances for the past year.

Amongst the glossy photos and graphics there is important financial information, vital for Question 4: Financial Facts, and other details on the company’s activities. These are some of the key sections:

Shareholder Letter from the CEO (Chief Executive Officer)

This is a message from the top executives summarising the company’s activities for the year, market position (how well it’s doing in comparison to competitors), finances, and future plans. It’s a chance for Execs to speak directly to shareholders.

It can help you to get an overview of the firm and understand how well the management thinks the company is doing.

Performance Highlights There is usually a section highlighting some of the company’s key achievements, such as special initiatives, goals achieved, or awards received by the company or its employees. This is to impress current shareholders and encourage others to invest.

This can provide some good info for the Strengths section of Question 3: SWOT Analysis, but remember to double-check what they say!.

Future Outlook This section looks at the company’s future objectives and goals, their plans for growth, and strategy on how they are going to achieve that.

Really useful for the Opportunities section of the SWOT Analysis and vital for Question 7 looking at company growth and where they will be in 5 years’ time.

Buyer Beware!

If you were writing your own school report, what would you say? As you might imagine, an Annual Report will present the company in the best possible light. You need to double check what they say by looking at other sources of information on the company and the sector it operates in before drawing any conclusions.

Q2: COMPANY PROFILE

- What does the company make, sell, or what services do they provide?
- Who are their customers?
- Where do they operate?
- How do they make money?
- Is the company profitable?
- Who are their competitors?

(This section can be illustrated with charts, photos, company statistics or graphics.)

WATCH MASTERCLASS: RESEARCHING A COMPANY

In the first part of this video Masterclass, former fund manager and competition judge, Christine Montgomery, tells us some of the key things to look for when researching a Company Profile and where to find that information.

Make notes as you go along

As you do your research, make notes as these will be useful for answering other questions such as the SWOT or ESG. Keep a note of all your sources as well as we want you to add these to the end of your report.

QUESTION 3: SWOT ANALYSIS RESEARCH REPORT

A SWOT analysis helps you to weigh up a company's Strengths, Weaknesses, Opportunities and Threats. This is a good way of seeing an overview of a business and its position in its sector.

Question everything and tell us what YOU think! What does the company do really well? Are they missing any opportunities?

Ideally, your company will have lots of strengths and opportunities, but just listing these and ignoring the weaknesses and threats does not make a good investment case!

All companies have weaknesses and face threats, but what are they doing to tackle them? If you can't see how they're addressing them, you could contact the company and ask.

Cross reference your information – can you find the evidence from more than one source?

Strengths, weaknesses, opportunities and threats can be major, or minor, so try to consider the scope of impact with each factor.

There are websites which provide ready-made SWOT charts on companies. Whilst you might use these as a source of reference, you obviously shouldn't copy and present them as your own work.

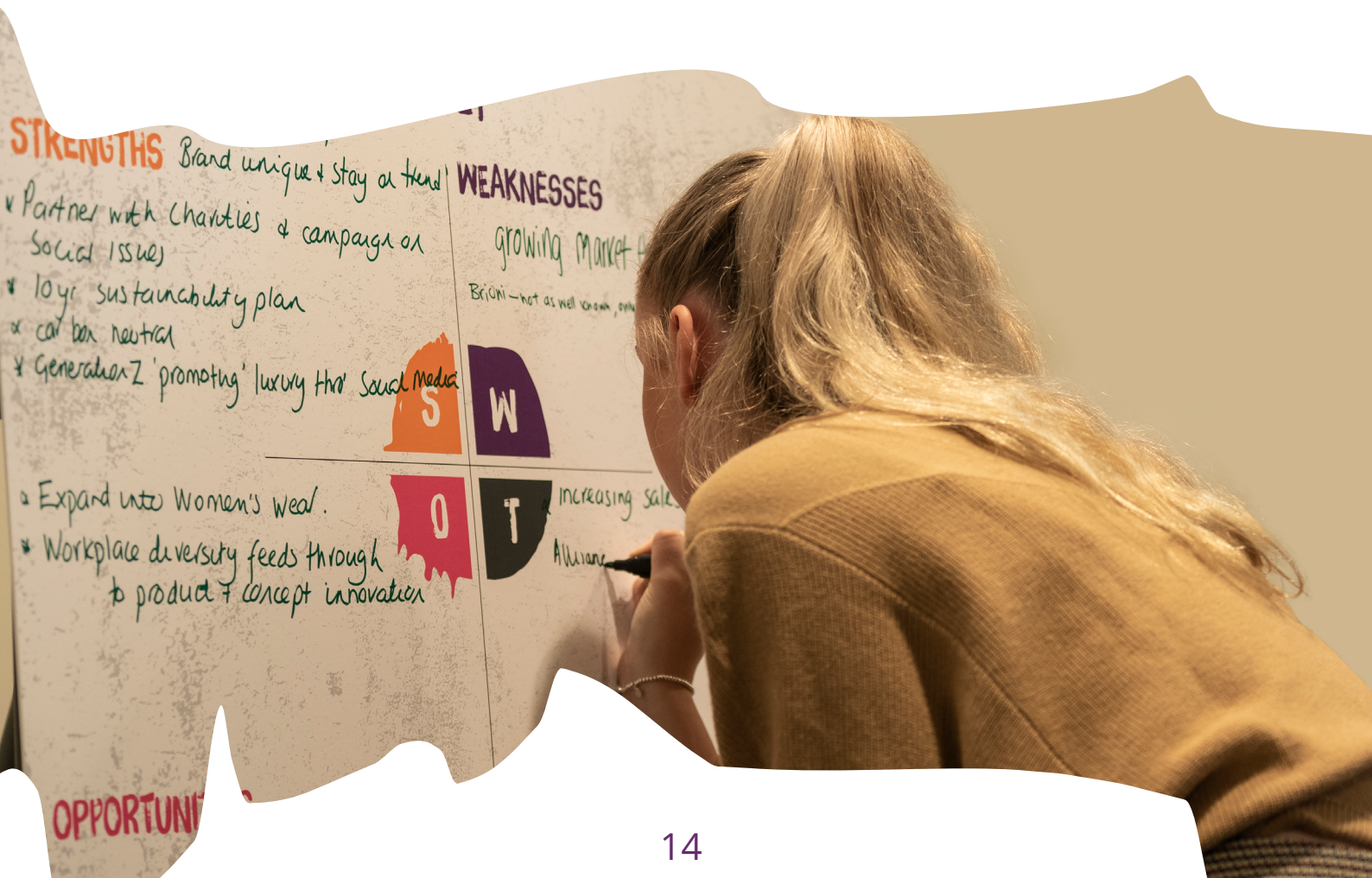
Q3: SWOT ANALYSIS

Make a list of Strengths, Weaknesses, Opportunities & Threats



WATCH
MASTERCLASS:
RESEARCHING A
COMPANY

In the second part of this video Masterclass, Christine uses Greggs as an example for a SWOT analysis and the types of factors to include in Strengths, Weaknesses, Opportunities and Threats.



QUESTION 4: 3 OR 5 YEAR FINANCIAL FACTS RESEARCH REPORT

Junior teams (S3 and S4) need to produce 3 years' sales figures and work out the sales growth.

Senior teams (S5 and S6) need to produce 5 years Financial Facts.

Example table below.

	2018	2019	2020	2021	2022
Sales (also known as Total Revenue or Turnover)					
Sales Growth %					
Earnings before tax and interest (EBIT) (also known as Operating Profit)					
Profit margin %					
Pre-Tax profit					
Profit growth %					

The information you need to fill in the 3 or 5-year Financial Facts table can all be found in your company's Annual Report.

You can get Annual Reports from the company's Investor Relations website, or Google "Company Annual Report" and the year you want, e.g.: "Greggs Annual Report 2020"

Once you have the Annual Report, to find the figures:

- Look in the "Accounts" section, or
- Use the "Find" function (Ctrl F) to search for "Consolidated Income Statement"

Sometimes, companies use different words for certain figures, so:

- **Sales** could also be called **Total Revenue or Turnover**
- **EBIT** (Earnings Before Tax and Interest) can be called **Operating Profit**.

This is a good area to ask your Competition Coach for advice and assistance with. Even if they do not know the answers, they can introduce you to someone who does!

QUESTION 4: 3 OR 5 YEAR FINANCIAL FACTS

Add charts, facts, tables and trends to build a whole picture of your company's financial position



**DOWNLOAD FINANCIAL
FACTS SPREADSHEET**

Financial Facts Spreadsheet is in the Competition Downloads section on the FA website.



**WATCH
MASTERCLASS:
SHARE PRICE AND
FINANCIAL FACTS**

In the first part of the video, Christine Montgomery explains how to find the figures and put them in our Excel template.

Sales are easy

I sell 10 sausage rolls for 99p each.
I have £9.90 of sales ($99p \times 10 = 990p = £9.90$)

Profits are easy when you know how

There are lots of different measures of profit depending on which costs are included in the calculation.

Gross Profit is **sales less the cost of the goods you've sold.**

I sell a sausage roll for 99p. The sausage roll costs 36p to make so I have a gross profit of 63p ($99p - 36p = 63p$)

You can express this as a percentage of sales to work out the Gross Profit Margin

$36 \div 99 = 36\%$ is the gross profit margin

Operating Profit is **how much money the company makes after all operating expenses have been paid.**

If your gross profit from selling a sausage roll is 63p and your distribution, selling and admin costs are 53p, your operating profit is $63p - 53p = 10p$

You can express this as a percentage of sales to give you an Operating Profit Margin

$10 \div 99 = 10\%$ is the operating profit margin

Operating profit is sometimes called EBIT or Earnings Before Interest and Tax. You have to pay interest and tax costs out of operating profit.

Profit is sometimes called income.

QUESTION 4: 3 OR 5 YEAR FINANCIAL FACTS

In this question we ask you to look at your company's sales and profit. **Sales and profit are not the same thing!**

**WATCH
MASTERCLASS:
SHARE PRICE
CHARTS & FINANCIAL
FACTS**

In the second part of this video, Investment Analyst and competition judge, Laura Fyfe, explains how to:

- find a company's sales, earnings and profit figures from their annual report, and
- put them into our Excel template using Greggs as a worked example

QUESTION 5: SHARE PRICE CHART RESEARCH REPORT

What is a Share Price Chart?

A Share Price Chart shows you the price of the company's shares, or stock, over a given period of time.

If there are more buyers than sellers, the stock price will rise. If there are more sellers than buyers, the price will drop.

The chart shows what the market and investors think the value of the stock is at a particular time, and whether they believe the company is desirable or not.

EXERCISE: GETTING A COMPANY SHARE PRICE CHART

- Put <https://uk.finance.yahoo.com> into browser
- Search for your company name
- Click on the Share Price Chart image or click on the "Chart" tab
- Alter the date range for anything between 1 day and 5 years, or a custom range using the calendar
- Click on "Comparison" to add in one of your company's competitors to show how the different shares are performing
- Export and save a copy of your chart by clicking on "Share" and selecting the "Download" image. You can save this image as png, jpg or other file of your choice to include in your Research Report.

QUESTION 5: SHARE PRICE CHART

Provide a share chart showing the price of your company's shares from 2015 to 2020. You can find share price charts in company annual reports, finance and Stock Exchange websites, or create your own on Excel.

- Provide a share price chart for one of your company's competitors.
- Make 3 points about what the charts tell you.



In the first part of this video, competition judge Christine Montgomery explains what a share price chart tells you and how to create one on <https://uk.finance.yahoo.com>.

DON'T JUDGE A BOOK BY ITS COVER - PRICE V VALUE

INVESTORS AIM TO BUY SHARES AT A LOW PRICE AND SELL AT A HIGH PRICE, THAT WAY THEY MAKE MONEY. TO DO THIS THEY AIM TO SPOT GOOD COMPANIES THAT ARE CURRENTLY UNDERVALUED BY THE MARKET.

BY UNDERSTANDING A COMPANY, WHAT IT DOES AND ITS FUTURE POTENTIAL FOR GROWTH, INVESTORS HOPE TO FIND GREAT COMPANIES AND BUY SHARES IN THEM BEFORE THE PRICE GOES UP.

QUESTION 6: ESG - ENVIRONMENTAL, SOCIAL AND GOVERNANCE POLICIES RESEARCH REPORT

You might think investors are only interested in the bottom line – how much money they can make from investing in company stocks and shares – but that isn't the case.

Like everyone else, investors are now very aware of the threat of climate change, and the need to treat people and the environment better. As Shareholders are part owners of companies, investors can put pressure on a company's management to pay attention to three little letters: ESG

E = Environment

Improving their impact on the environment might include a company:

- switching to using renewable energy
- reducing the amount of water they use, or waste they produce
- switching to recycled packaging for their products.

S = Social

Social = people! This could mean how they treat employees:

- paying decent wages
- offering paid holidays and pension plans
- ensuring safe and comfortable working conditions.

It could also mean treating customers with consideration, offering good customer service, responding quickly to complaints, and ensuring products and services are safe.

Companies operate in wider society, so do they have a responsible Mission Statement, do they seek Diversity and Inclusion in their workforce, and do they support any charitable causes?

G = Governance

Governance is essentially leadership and management.

How well do the Board of Directors attend to the interests of stakeholders – that's employees, customers, suppliers and shareholders?

Does the Board include a good mix of experienced people, does it make sure the CEO is doing a good job, and does it keep an eye on executive pay and bonuses?

ESG and Responsible Investing matters more and more to investors and many will no longer back companies who do not take their wider responsibilities seriously.

Finding the info

To find out what a company is doing in these areas, check out their:

- Annual Reports
- Investor Relations website
- Corporate Responsibility reports



QUESTION 6: ESG – ENVIRONMENTAL, SOCIAL AND GOVERNANCE POLICIES

Tell us about your company's commitment to social and environmental responsibility, e.g:

- What are the ESG issues that are most relevant for this company?
- What policies and actions has the company got in place? For example:
- Are they sourcing products responsibly? How are they doing this?
- Are they increasing renewable energy use and if so, how?
- Are they reducing waste and pollution and if so, how?
- Are they addressing the gender pay gap and how?
- Do the Board of Directors hold shares in their own company?



WATCH MAKE YOUR MARK: SPEECH

“I'm not a confident speaker. I don't like giving presentations.”

Have you said these things? Then watch the third video from Susan Room on Speech. Susan gives advice on speaking with confidence, tips you can use in presentations, interviews, speaking in class or for your 3-minute Elevator Pitch Video. Please see your teacher for access to Susan's video content.



WATCH MASTERCLASS: ESG

You cannot assume a company will continue to do well in the future simply because it's done well in the past.

Without a crystal ball, it's hard to know where your company will be in 5 years' time. However, investors need to spot future opportunities as well as future threats so that's what we're asking you to do.

One place to start is where the company's management believe it's going to be in future:

- Check the company's Investor Relations website for presentations or information on future plans.
- Annual Reports contain letters or statements to shareholders from the CEO and the Chair of the Board. These often set out a vision for where the company is going.
- You can contact the company directly and ask them what they think the scale of opportunity is for their business.

You'll have to question whether you agree with them, but it's a good place to start!

EXERCISE: PREDICTING THE FUTURE

Considering growth also involves considering what you think the future holds, and why?

Get each team member to write answers to these 5 questions on post it notes. Consider everyone's answers and think about how they would affect your company's future:

1. What will the world look like in 5 years' time? What will have changed and what will be the same?
2. What problems are we facing now that will still be with us in 2028?
3. What opportunities might be available in 5 years' time?
4. What products or services will people need 5, 10, or 15 years from now? Could your company provide them?
5. What innovations are being made now that we won't be able to live without?

Investor, James Anderson, and his team aimed to buy and hold "the world's most exceptional growth companies" for the long term which led him to invest in Amazon back in 2004, and Tesla in 2013. When thinking about how much a company will grow in the future, James suggests:

- Think about the **scale of opportunities** that there are for the business.
- What are the company doing that is different? **Think creatively** and imagine where that could take them.
- Try to imagine different **future scenarios** and think about how likely each of those are. Be "profoundly positive"!
- A company's leadership and culture are vital! What are the leadership doing that is different and **what is their vision?**
- To see how a leader's vision can indicate how a company will grow, James suggests reading **Jeff Bezos' 1997 letter to Amazon shareholders**.

QUESTION 7: GROWTH - LOOKING FORWARD!

Looking at a company's track record is informative, but as the adverts say, past performance is not a guarantee of future results! When considering a company for long-term investment you need to understand how it makes money and think about how it will grow in the future.

Use what you have learned in your research and analysis to think about where your company will be in 2028:

- How much bigger will this company be?
- What are the factors helping this company to grow?
- Do you think this company will maintain or improve its profitability and why?

WATCH
MASTERCLASS:
LOOKING FOR GROWTH
AND MAKING YOUR
INVESTMENT CASE

A recording of a live Masterclass with Future Asset Chair, Sarah Whitley, and James Anderson, former co-manager of the Scottish Mortgage Investment Trust.

James and Sarah discuss how to predict a company's growth prospects, imagining how great a company could be and some of the key things to get into an investment pitch. As a recording of a live discussion, this is good to listen to like a podcast!

QUESTION 8: OTHER IMPORTANT INFORMATION RESEARCH REPORT

This is the place to add in any important points that you couldn't fit in under the main questions, things you think our judges should consider and which add to the strength of your case.

It could be:

- your own thoughts on whether you would invest in the company
- a suggestion you would like to make to the company's management, or something you think they should do
- something you think the judges would find interesting and relevant

When our judges review your pitches, there are points available for this section so do add something here!

RESEARCH SOURCES

Evidence is everything! Point us to your research activity.

Please provide the sources (as live links, or book / author) that you used in your research and making your investment case.

- Websites
- Publications
- TV/YouTube
- Social media
- Other?

Please tell us what sources you used in your research. We just want to see that you have used a wide variety of reliable and reputable sources.

It's important to cross reference your information by checking it on different sources. That way you can be confident you've got the facts straight. Sometimes you will find that websites, especially when offering opinions about investments, present contrasting cases. When this happens, you have to decide which you think is most convincing, and why.

QUESTION 8: OTHER IMPORTANT INFORMATION

Anything else you would like to tell us, e.g.:

- Long term company goals – are you convinced by them?
- What makes them better than their competitors?
- Would you invest your own money in this company?

In your Elevator Pitch video you should present your strongest, most convincing arguments for investing in your chosen company in no more than 3 minutes!

Don't try to whizz through your whole Research Report in 3 minutes. The Research Report may be in a PowerPoint template, but it is not meant to be delivered as a presentation. Rather it provides your detailed arguments and evidence for investment.

The Elevator Pitch gives you the chance to tell us why you believe in this company, its products or services, and why you think it represents a great investment opportunity for the long term.

EXERCISE: IN THE ELEVATOR

Take turns to be the Pitcher or the Judges.

Pitcher: Imagine you are stuck in a lift with the judges.

You have three minutes to get from the top of the building to the bottom floor and the exit when the judges will be away and out of your life. What could you say to convince them to invest in your chosen company?

Take turns being the Pitcher

- Time yourself to make sure you don't go over 3 minutes
- You could even record your pitches to review afterwards.

Judges: Your job is to decide who does the most convincing pitch!

- what were the stand out arguments?
- what techniques did the Pitchers use that you found convincing?
- was there anything the pitchers missed that they could have included?

This should really help you see what works for your final elevator pitch video.

You could even ask your Head Teacher or another adult for 3 minutes of their valuable time to try out your arguments.

Video format

Your Elevator Pitch can be presented in any way you wish, be that Tik Tok style, animation, or even an investment game show! It's your chance to speak directly to the judges, to make a positive impression, so go for it.

It is worth practising it, or sharing the concept with your teacher and Investment Mentor before sending it in. They may have valuable feedback to perfect your pitch.



ELEVATOR PITCH VIDEO

An Elevator Pitch is a brief, persuasive speech that you use to spark interest. You can also use it to create interest in a project, idea, product – or in this case - your investment idea.

It should be **interesting**, **memorable** and **succinct**.



**BONUS
MASTERCLASS: TIPS
FOR VIDEO RECORDING
WITH SIMON BADHAM**

Video by film maker Simon Badham, giving you some tips on creating the best video you can.

From framing and lighting to sound and editing, Simon's advice can help you make your pitch super professional.



**MAKE YOUR MARK:
VOICE**

In the last of her four Make Your Mark Masterclasses, Susan discusses how to use your voice to communicate more effectively, capture attention and convince and persuade. Perfect for making your Elevator Pitch Video! Please see your teacher for access to Susan's video content.