

GROWING
FUTURE
ASSETS
INVESTMENT COMPETITION

SENIOR COMPETITION S5-6
RESEARCH
REPORT

Your school:

Teacher contact:

Team members:

Investment mentor:

Company you are pitching:

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

- 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.)

If you need more space for your reasons, duplicate this page.
(Right-click on the thumbnail and duplicate slide)

Strength

- Make a list of strengths

Weakness

- Make a list of weaknesses



Opportunity

- Make a list of opportunities

Threats

- Make a list of identifiable threats

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

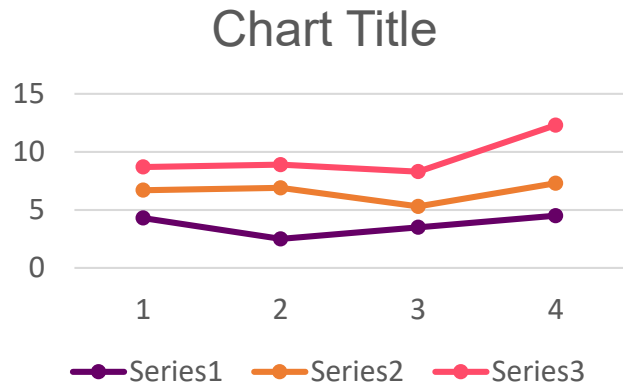
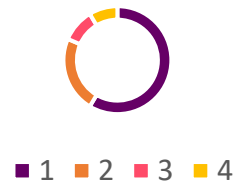


Chart Title



	2016	2017	2018	2019	2020
Sales					
Sales Growth %					
Earnings before tax and interest (EBIT)					
Profit margin %					
Pre-Tax profit					
Profit growth %					

*Excel spreadsheet provided: **Five Year Financial Facts Template** 😊

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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.

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?

Looking at a company's track record is informative, but 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 2026:

- 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?

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?

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?