Growing Future Assets Investment Competition

COMPETITION TOP TIPS

2026

BEFORE THE COMPETITION STARTS
INTRODUCTION WEEK

Your mission:
Choose a company and decide whether we should invest or not! Then prove your case with solid evidence and sharp analysis.

You'll work in teams, guided by a Competition Coach (an investment professional). Together, you'll dive into the company's story, and give your verdict: To buy… or not to buy?

What you'll deliver:

- A written Research Analysis – your detailed investment case.
- A 3-minute Elevator Pitch video – your big moment to convince us.

This booklet is packed with hints, tips, and tools to help you create a winning pitch. Inside, you'll find:

- Fun and practical exercises to sharpen your skills.
- Links to our video Masterclasses (on the Competition Masterclasses page of the Future Asset website), presented by real Investment Managers, with expert advice to give your work an edge.

Before you start your research:

- Read the Introduction to Investment Management booklet.
- Watch Introduction to Investment Management video.

These will give you the foundations you need to understand investing and your competition challenge.

Got questions? We've got answers. Email info@futureasset.org.uk or ask your Competition Coach in your first meeting.

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...

14 September	**Build your team** and contact your Investment Mentor!
21 September	**Choose your company** and start your research plan
28 September	**Start your research!** Company profile & SWOT
5 October	**SWOT** and gather information for Financials
12 -19 October	**October holidays and** further research
26 October	**Finance & Share Price Chart** Read Annual Report
2 November	**Financials and ESG -** Look at company policies
9 November	**ESG and Future growth** Key points for investment case
16 November	**Future growth -** further anaysis and practice elevator pitch
23 November	**Finalise key arguments for investment reccomendation**
30 November	**Deadline Week** Edit elevator pitch video and proof read your submission

GROWING FUTURE ASSETS INVESTMENT COMPETITION

Before getting started, be sure to explore the helpful resources available. They're packed with useful information and tips that will support you throughout the competition.

KNOW YOUR STUFF!
Competition Introduction Presentation

FOLLOW THE RULES
Competition Introduction Presentation

DOWNLOAD YOUR INVESTMENT REPORT
- Junior Template (S3 - 4)
- Senior Template (S5 - 6)

PICK YOUR COMPANY!
Competition Crib Sheet Poster!

LEARN FROM THE BEST
Competition Mini-Masterclasses

FOLLOW THE WEEKLY GUIDE
Competition Top Tips Document

Follow our social media channels to stay up to date with weekly Competition news, highlights, and updates.

Instagram and TikTok: @Future_Asset

TEAMS THAT WORK WITH THEIR COMPETITION COACH PRODUCE BETTER PITCHES!

Competition Coaches are finance professionals who volunteer their time to help the teams through the competition. They provide advice, insights, and real links to the industry.

All schools are assigned a Competition Coach. Teams that work with their Coach make better pitches, as well as getting experience working with a professional.

GROWING FUTURE ASSETS INVESTMENT COMPETITION

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!

GROWING FUTURE ASSETS INVESTMENT COMPETITION

EXERCISE: SELLING A PRODUCT

Your chosen company will sell its product or service, and your team has to "sell" your investment reccomendation to the judges in your investment pitch.

Ask your teacher to gets 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 company's financials 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. **As soon as you get their details, get in touch!** They're all really nice people who are keen to help.

- As soon as you get your coach's details, get in touch! They're friendly, supportive, and keen to help.
- Plan around 4 meetings during the competition.
- Agree on meeting dates early so everyone has a clear schedule.
- Share an agenda before each meeting so you know what to discuss and prepare.
- Meet online via Teams, Google Meet, or similar — or in person if possible.
- Keep in touch between meetings by email or phone — great practice for professional communication.

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 COACH 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 Poster and on our website.

For each company we have given you:

- A company descriptor
- Links to their main and Investor Relations websites
- 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.

COMPANIES CRIB SHEET

Visit our website to find the list of companies and the company crib sheet poster — this has also been sent to your school.

https://www.futureasset.org.uk/wp-content/uploads/2026/06/FA-Crib-Poster-2026-A2_Digital.pdf

	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

GROWING FUTURE ASSETS INVESTMENT COMPETITION

You have a total of 10 weeks to complete the competition tasks (excluding 2 weeks for October break)

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 project 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!

Week commencing	Topics & Team Tasks	Outside meeting / Own research
7 September Intro week	• Watch **Intro to Investment** & **Mindset** • Team Building exercise • Plan meeting dates • Meet librarian to show how to access Financial Times & websites for research	• Read **What is Investment Management?** & watch **Real People in Investment** videos • Download Competition materials from the FA website.
14 September Comp Week 1	• Watch: **Researching a Company** • Discuss company choice – who likes what? • Email Competition Coach with possible meeting dates and times • Decide team members to lead on different areas: finance, ESG, video production, etc. • Prepare for 1st Coach Meeting! Watch **Masterclass: Body Language** as this could be useful!	• Look out for email reply from your Coach and look at our Career Cards for some serious inspo!
21 September Comp Week 2	**Coach Meeting 1: Introduction** • Introduce ourselves, ask about them, discuss company choice and where to start research • Agree on company • Agree how best to share info amongst team. (Google drive, Whattsapp group?) • Start research! Agree who will look for what info / look at what source.	Research for Q1: Company Profile Q2: SWOT Analysis
28 September Comp Week 3	• Use research to start filling in Company Profile & SWOT Analysis • Make notes for other questions when you find that information. You might come across some cool ESG facts during your initial research.	• Watch **Masterclass: Speech** • More company research for Company Profile & SWOT. Look at sector and competitors so you can compare.
5 October Comp Week 4	**Coach Meeting 2: Financials** • Complete Q2: Company Profile & Q3: SWOT Analysis • Watch **Masterclass: Share Price Chart & Financial Facts** • Tell / show Coach your work so far. • Ask questions about Q3: Financials and Q4: Share Price Story	• Have a go at getting a company Share Price Chart on **Yahoo Finance** website • Find company's most recent Annual Report

PROPER PRIOR PLANNING FOR PERFECT PERFORMANCE

12 October | Comp week 4| [Oct Break] 19 October | Comp Week 4 | [Oct Break]		
26 October Comp Week 5	• Finish research for Q3: Financials and Q4: Share Price Story • Watch **Share Price Chart Case Study** to understand more about what they can tell you. email teacher & Coach for them to check it if you're unsure!	• Watch Mini - Masterclasses: • **Profitability** • **Borrowing** • **Financial Health**
2 November Comp Week 6	**Coach meeting 3: ESG** • Q5: Sustainability and ESG: make sure you cover all areas: Environmental, Social and Governance • **Watch mini-masterclass on ESG.**	• Think about risk. Are there any opportunities or risks regarding your companies ESG policies. • Watch mini-masterclass on **Impact Investing** and **Stewardship.**
9 November Comp Week 7	• Discuss your ideas for Growth- Looking Forward, and your key investment arguments for Investment Recomendation...what do your team members think so far? Buy or Dont Buy?	• Consider points for Q7: Other important thoughts • Collate Research Sources for end of Research Report
16 November Comp Week 8	• Finish Q6 and think about Q7. Look back on your research, talk to your teammates and think of other important points you would like to make.	• Finalise Company Analysis • Draft Elevator Pitch outline and 'script' • Spell and grammar check Research Report. Ask someone (teacher or Coach) to proof-read it!
23 November Week 9	**Coach meeting 4: Final edits** • Get Coach feedback, give them a preview of your Elevator Pitch! • Edit Elevator Pitch Video • Make your final investment recommendation decision and finalise your investment case • Start your Elevator Pitch video	• Spell and grammar check Research Report. Ask someone to proof-read it! • Have fun with your Elevator Pitch! Be creative! • Watch **Masterclass: Tips for Video Recording**
3- November Deadline week!	• Edit Elevator Pitch Video • Send in your Company Investment Analysis & Elevator Pitch Video • Send a copy to your Competition Coach and send them a thank you email for helping you! • CELEBRATE!!	• 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 and follow Future Asset on socials!
Friday 4th December 5pm: COMPETITION DEADLINE		

MAKE YOUR MARK
WITH SUSAN ROOM

GROWING FUTURE ASSETS INVESTMENT COMPETITION

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**

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

GROWING FUTURE ASSETS INVESTMENT COMPETITION

To provide a solid investment recommendation 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.

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 3: Company Financials, 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 2: 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 6: 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.

Q1: COMPANY PROFILE

- What does the company do? How does it make money?
- What makes this company interesting?
- What gives it an edge over competitors? This could be a unique product, a famous brand, loyal customers, a global reach etc.

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

WATCH MASTERCLASS: RESEARCHING A COMPANY

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.

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.

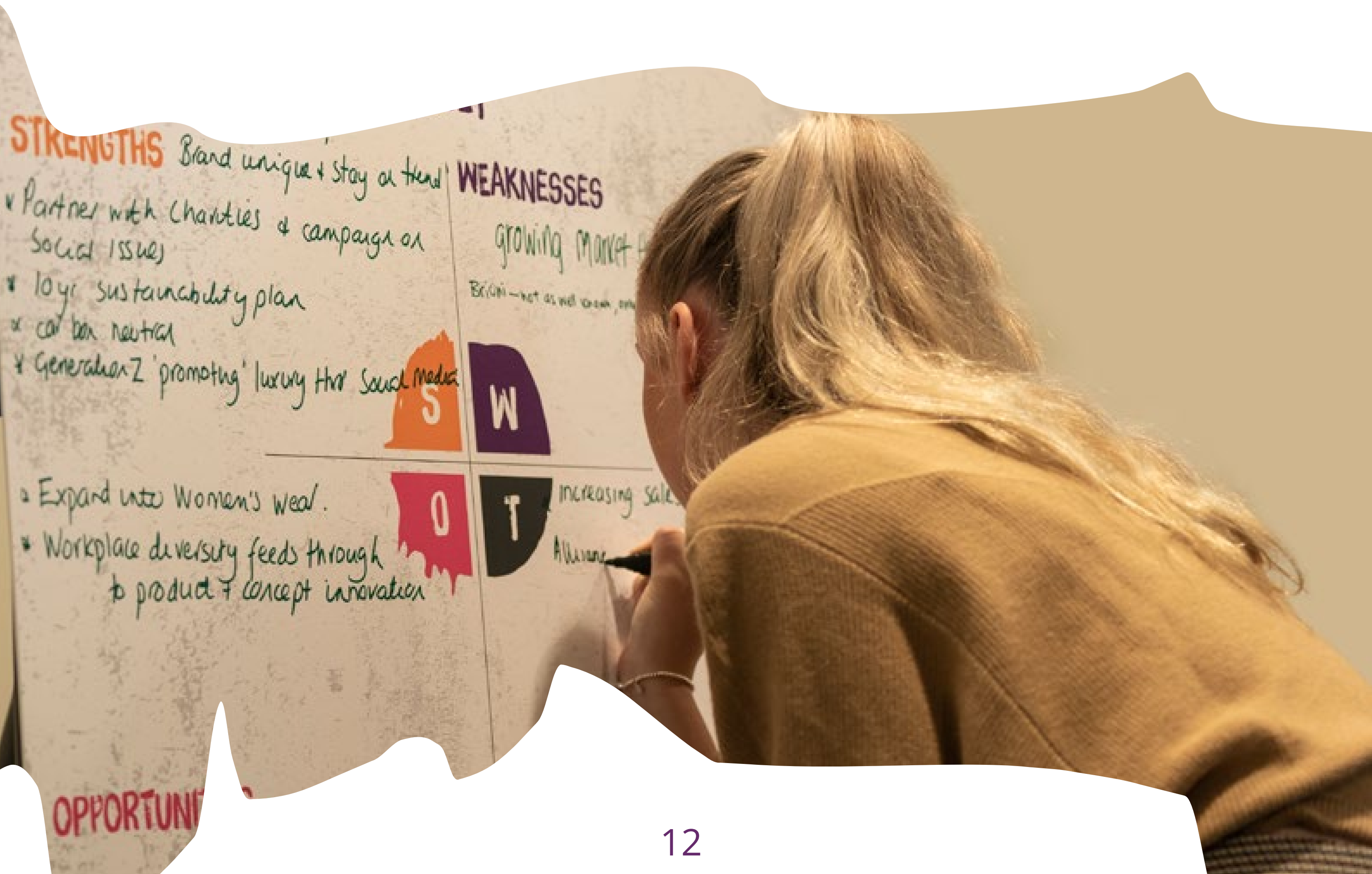
There are websites which provide ready-made SWOT charts on companies. Whilst you might use these as a source of reference, you obviously shouldn't copy and present them as your own work. **You also shouldn't ask AI to write your answers for you - the judges have software that identifies this.**

Q2: SWOT ANALYSIS

Make a list of Strengths, Weaknesses, Opportunities & Threats

Give your top 5 points in each of these categories:

- **Strengths** – What does this company do really well?
- **Weaknesses** – What might hold it back?
- **Opportunities** – What could help it grow in the future?
- **Threats** – What could go create problems or go wrong?



The information you need to fill in the Financials can all be found in your company's Annual Report and Investor Relations website.

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

Now you have the data - lets break down the question:

1. Profitability

- Is the company making a profit?
- If not, why not? Do you think it will become profitable in the future?

2. Borrowing

- Is the company borrowing too much money?

3. Financial Health

- Can you spot any signs of weakness in the company's financial position?

EXERCISE: FINANCAL CHECK CHALLANGE

Profit Power

If a company sells £2bn worth of products and makes £200m profit, what percentage of sales turned into profit? (Hint: £200m ÷ £2bn)

Borrowing Balance

A company makes £195m profit but pays £14m in interest. Can they cover their interest costs at least 3 times over?

Cash Check-Up

A company generates £350m in cash from its operations but only has £125m left at year-end after spending. Does that sound healthy to you? Why or why not?

Bonus Round: Pick any big brand you know (Nike, Apple, Greggs, Tesco…). Can you find their latest annual report online and try the same 3 checks?

QUESTION 3: COMPANY FINANCIALS (JUNIOR)

a. Is the company covering its costs?

b. Profitability

Is the company making a profit?

If not, why not? Do you think it will become profitable in the future?

QUESTION 3: COMPANY FINANCIALS (SENIOR)

a. Profitability

b. Borrowing

c. Financial Health

MINI MASTERCLASSES:

1. PROFITABILITY
2. BORROWING
3. FINANCIAL HEALTH

You don't have to be a finance expert -

just explain what you notice and what it might mean.

GROWING FUTURE ASSETS INVESTMENT COMPETITION

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 the save this image as png, jpg or other file of your choice to include in your Research Report.

QUESTION 4: SHARE PRICE STORY

- Include a chart showing the company's share price from 2020 to 2025.
- Make 3 points about what the chart tells you (e.g. major rises or drops, stability, patterns over time)

WATCH MINI MASTERCLASS: WHAT IS A SHARE PRICE CHART

In this video, Investment Manager, Roshan Vohra, explains what a share price chart tells you.

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.

GROWING FUTURE ASSETS INVESTMENT COMPETITION

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:
- trying to use more 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 5: SUSTAINABILITY AND ESG

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 MASTERCLASS: ESG

"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.

GROWING FUTURE ASSETS
INVESTMENT COMPETITION

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 5 years time ?
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 6: LOOKING TO THE FUTURE

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 5 years' time:

- 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 MINI MASTERCLASS COMPANY RESEARCH

GROWING FUTURE ASSETS INVESTMENT COMPETITION

This is the place to add in any important thoughts 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!

TOP TIP: INCLUDE YOUR 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 is 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.

Human Vs Artificial Intelligence

AI can be a useful tool, but we want to know what you and your team think, not what Chat GPT says. You can use AI for research, but it is vital that you:

- Double check all information
- Write your Company Investment Analysis and Elevator Pitch in your own words.

We use tools to detect AI generated text. It is your critical thinking, analysis, and creativity we are interested in!

QUESTION 7: OTHER IMPORTANT THOUGHTS

Is there anything else you want to tell us that helps your investment case?

- You could include things like:
- Would you be proud to work for this company?
- Do you believe the company's management team achieve their goals?
- Is there something surprising, exciting, or worrying that stood out to you?

GROWING FUTURE ASSETS INVESTMENT COMPETITION

WOULD YOU RECOMMEND INVESTING IN THIS COMPANY?

This is where you put your strongest and most persuasive arguments for investing - or not 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 (seniors) 400 (juniors) words so this needs to be **concise and to the point:**

- Decide your strongest arguments and focus on them.
- Why do you think this company is, or isn't, a good long-term investment for the next 5+ years?
- Why do you believe it will be successful/unsuccessful in the future and what is your evidence for that?

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?

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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 Competition Coach along with the rest of your Company Investment Analysis and Elevator Pitch Video. They know a good investment pitch when they see one, and can give you valuable feedback and suggestions.

Grammer and speeling r verry important in the werk plaice. Make extra sure you spell check, and sense check your Company Investment Analysis before you submit it!

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

Q8: INVESTMENT CASE (500 WORDS MAXIMUM)

PART 1: .Would you recommend investing in this company?

Choose one:

BUY – We recommend investing in this company

DO NOT BUY – We don't recommend investing in this company

PART 2: Investment case. 500 words max (seniros) 400 words max (juniors)

Tell us: Why do you think this company is, or isn't, a good long-term investment for the next 5+ years? Pull together the key reasons from your research and analysis and explain in your own words **why** we should invest or why not.

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

Don't try to whizz through your whole Company Investment Analysis in 3 minutes. Your analysis 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.

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 Competition Coach 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 reccomndation.

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.