

• Pictured: The 2024 global winners featured on the NASDAQ billboard in New York.

100

countries and regions worldwide

3200

schools globally participating

17000

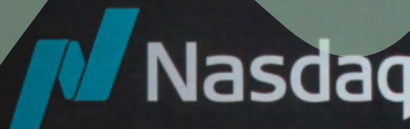
students participating annually

20000

students have completed YIS courses

For Grades: 9-12

Nasdaq Congratulates
Zach Saporito
St. John's Preparatory School, MA
2024 Young Investors Society
Global Stock Pitch Competition Winner



YIS Global Stock Pitch Competition

Seeking the Future Leaders of Wall Street

Global Finance Leaders

sponsorship and support from top industry leaders

CYIA™ Designation

highly recognized by leading universities and global employers

Official Curriculum

designed to align with undergraduate-level finance education

Stock Exchange Challenge

real-world practice in stock trading

Stock Pitch

stock and investment analysis

Preliminary Round (2026.4.12, 6.7, 6.28/Online)

Asia Round (2026.7.29 - 8.3/ Shanghai, China)

Global Round (May to June 2027/New York, USA)



Introduction

The **YIS Global Stock Pitch Competition** is the flagship program of the Young Investors Society (YIS), a 501(c)(3) non-profit organization. Founded in 2015 by Wall Street Chief Investment Officer James Fletcher together with leading experts in finance and business, YIS has received sponsorship and support from more than twenty global financial institutions and industry leaders, including **Bloomberg, Goldman Sachs, and J.P. Morgan**. Its mission is to provide students from diverse backgrounds with high-quality financial literacy education and equip them with lifelong investment skills.

The competition centers on simulated stock exchange challenge and stock pitch, guiding students to gain a deeper understanding of financial markets, strengthen analytical skills, and foster a long-term investment mindset. Participants also have the opportunity to pursue the **CYIA™ (Certified Young Investment Analyst)** designation, a prestigious credential **widely recognized and respected** by universities and future employers.

By 2025, the competition had expanded to more than **100 countries and regions**, attracting over **17,000 students globally**. Outstanding winners are invited to New York—the World Financial Centre—for the **YIS Global Youth Investment Summit**, where participants not only sharpen their investment thinking through academic challenges and financial games, but also engage in workshops and panel sessions, gaining insights into the latest industry trends while networking with peers and professionals from around the world. Past champions have even seen their achievements celebrated on the **NASDAQ billboard in Times Square!**

Academic Board



James Fletcher, CFA

**YIS Founder & President
Founder & CIO at Ethos
Investment Management**



Vielcka Mansukhani

**North America Head of
Equity Sales at Bradesco /
Latin America Institutional
Equity Sales**



Steve Barrus

**Financial Consultant at
Advisory Group for Life**



Oliver Daley

**Sales Manager for
Investment Managers
at Bloomberg LP**



Patricia Ball

**Chief Operating Officer
- Ethos Investment
Management**



John Bowman

**Executive Vice
President
- CAIA Association**



Claudio Brocado

**Head of Global Equities
- Nuclio Independent CIO**



Morgaine Conway-Grim

**CEO and Founder
- Hawks & Doves**



Bryan Jack

**Chief Financial Officer
- First Community Bank,
Utah**



Dave Miles

**Research Analyst
- Fidelity Investment**



Laura Geritz

**Chief Executive Officer
- Rondure Global Advisors**



Andrew Davis

**Independent Financial
Advisor
- WealthSource
Partners, LLC**



Liz Su

**Lead Portfolio Manager
- Sustainable Emerging
Market Equities at Boston
Common**



Network



100 countries and regions worldwide

3200 schools globally participating

17000 students participating annually

20000 students have completed YIS courses

Sponsors and Partners

Bloomberg

PIMCO



Goldman Sachs

J.P.Morgan
ASSET MANAGEMENT



Folsom Family
Foundation



FREDRICK H BARTH
FOUNDATION





Development Path

Preliminary Round

Asia Round

Global Round

1

Preliminary Round

Dates: April 12, June 7, June 28, 2026

Location: Online

Content: Stock Exchange Challenge + Stock Pitch (Beginner Level)

Team Formation: Individuals or two-member teams

Language: English

Advancement Criteria: Participants who complete all stages and win awards will qualify for the **Asia Round**



2

Asia Round

Dates: July 29- August 3, 2026

Location: On-site (Shanghai, China)

Language: English

Content: Stock Exchange Challenge + Stock Pitch (Intermediate Level)

Team Formation: Individuals or two-member teams (team members must remain the same as in the Preliminary Round)

Advancement Criteria: Participants who win the **Overall Award** or **Stock Pitch Winner** will qualify for the **Global Round**



3

Global Round

Dates: May-June 2027

Location: On-site (New York, USA)

Language: English

Challenge Content: Case Study Competition + Stock Pitch (Advanced Level)

Team Formation: Individuals or two-member teams (team members must remain the same as in the Asia Round)





Preliminary Round

Online Schedule

Morning (09:00 – 12:00)

Stage 1 (online)

- Opening Ceremony: Overview of the Stock Exchange Challenge System & Rules
- Stock Exchange Challenge – Test Round
- Analysis of Listed Companies
- Stock Exchange Challenge – Official Round

Stage 2 (work submission)

- Stock Pitch presentation video
- Stock Pitch report & PPT



Stock Exchange Challenge

Step into the fast-paced world of the stock market! Manage \$100,000 in virtual funds, track real-time rankings, and use strategy and risk management to chase the highest returns.

Test Round: 20 minutes × 1 round

Official Round: 40 minutes × 2 rounds

- **SEC First Place:** Top 5% of teams in this stage
- **SEC Second Place:** Top 15% of teams in this stage
- **SEC Third Place:** Top 30% of teams in this stage



Stock Pitch

Take on the role of a fund manager! Analyze a listed company, deliver a 'Buy or Sell' pitch to expert judges, and sharpen your financial and presentation skills. Material requirements will be released **2 weeks prior**. The submitted works include: **1. Stock Pitch report & PPT; 2. Stock Pitch presentation video (7-10 minutes)**. Industry experts will score based on the evaluation form.

- **Stock Pitch First Place:** Top 5% of teams in this stage
- **Stock Pitch Second Place:** Top 15% of teams in this stage
- **Stock Pitch Third Place:** Top 30% of teams in this stage



Overall Awards

- **Best Delegate:** Top 5%
- **Outstanding Delegate:** Top 15%
- **Honorable Mention:** Top 30%
- **Commendation:** Top 60%

Award decisions combine results from both challenge stages. Participants **MUST complete both stages, with **Stock Exchange Challenge 40%** and **Stock Pitch 60%** of the total score.*

*All award-winning teams will receive a digital **Certificate of Achievement**.

*Teams that participate in all stages will receive a digital **Certificate of Participation**.

*Only winners who participate in the entire process can advance to the next round.

*Award and certificate details will be emailed within 15 working days after the challenge.

Fees: RMB 398 per person



Scan the QR code to register





Asia Round

Award-winning participants from the Preliminary Round will be invited to join the **Asia Round**, where three key modules are closely integrated: **Committee Session**, **Stock Exchange Challenge**, and **Stock Pitch**. The **Committee Session** helps participants build a comprehensive financial investment framework and knowledge system. The **Stock Exchange Challenge** focuses on hands-on practice, testing psychological resilience, risk management, and strategic analysis skills. Finally, participants will complete a **Stock Pitch Competition** that closely mirrors real-world professional and financial scenarios, enhancing critical thinking, financial analysis, and presentation skills, while laying a solid foundation for their future careers in finance.



Challenge Sessions



Committee Session

A step-by-step academic curriculum designed to build a solid investment knowledge system.

- **Thematic Learning:** Participants will learn about capital market operations, index construction, efficient market hypothesis, behavioral finance, valuation models, and portfolio management.
- **Interactive Presentation:** Students will work in teams to analyze companies using SWOT, calculate intrinsic value, and present investment recommendations. The best speaker will be awarded based on overall performance.
- **In-Class Practice:** Immediate application and reinforcement of key concepts to ensure solid understanding and tangible learning outcomes at every stage.

1



Stock Exchange Challenge

Manage **\$100,000 in virtual funds** using a real-market-based online SEC trading system. Compete in **3 rounds, 40 minutes each**, and complete a short online test after each round.

*Tests are closely tied to the trading round content.

2



Stock Pitch Competition

Step into the role of a professional fund manager! Analyze a selected company from multiple angles, prepare a **Stock Pitch Report** with a clear “Buy or Sell” recommendation, and present your pitch to expert judges.

Participants will be randomly assigned to judging rooms and have **10 minutes** for their presentation: **7 minutes to present** and **3 minutes for Q&A**. The presentation format is fully flexible. The goal: convince the judges to adopt your investment recommendation—be creative!

3



*Preparation materials for the Asia Round will be emailed to participants **2 weeks before the official challenge**.



- **Location:** On-site (Shanghai, China)
- **Language:** English
- **Dates:** July 29 to August 3, 2026
- **Team Formation:** Individuals or two-member teams (team members must remain the same as in the Preliminary Round)
- **Advancement:** Participants who win the **Overall Awards** or **Stock Pitch Winner** will be invited to the **Global Round in New York**



Awards

- **Best Traders:** Top 40% of teams in the Stock Exchange Challenge
- **Stock Pitch Winner:** Highest-scoring team in each room

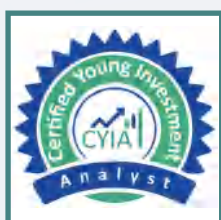
Overall Awards

- **Best Delegate:** Top 5% of teams
- **Outstanding Delegate:** Top 10% of teams
- **Honorable Mention:** Top 25% of teams
- **Commendation:** Top 40% of teams

Participants in the Asia Round also stand a chance to win:

Certified Young Investment Analyst (CYIA™) Designation

The **CYIA™ Designation** is the highest honor within the YIS and represents a remarkable achievement in financial literacy and investment skills—**less than 10%** of YIS students ever reach this level. It is **widely recognized and respected** by universities and future employers, making it a powerful addition to college application.



What It Means to Earn the CYIA™ Designation

- Mastered the fundamentals of stock analysis
- Passed a rigorous examination
- Maintained exceptional academic performance
- Proven readiness for future studies in business, finance, or accounting

* **Certification Process:** Preliminary Review → Written Test → Interview
(The preliminary review is open annually in September)

Eligibility:

All Asia Round participants



Global Round-New York

YIS Global Stock Pitch Competition



YIS Global Youth Investment Summit is the annual flagship event for students worldwide, offering an immersive platform for financial learning and practice. Teams from across the globe will take part in the **ultimate academic challenges**, including:

1

Challenge Sessions



Case Study Competition

A signature challenge where students act as strategic consultants for a real company. In 2025, the theme centers on a global entertainment firm. Teams prepare in a short time, deliver a **3-minute** pitch to finance professionals, and compete for the championship. The challenge mirrors real business scenarios and builds **critical thinking, problem-solving, and decision-making skills**.



Advanced Academic Session

* YIS committee will release a global ranking of all qualified teams before the Global Round. Only the top 100 ranked teams will be eligible to unlock this session.



Global Stock Pitch Competition

Teams will select a company, prepare a **Stock Pitch Report**, create a presentation recommending whether to **Buy or Sell** the stock. The competition has three rounds, each team has 20 minutes (10-minute presentation, 5-minute Q&A, 5-minute judges' feedback) to do Stock Pitch.

2

Academic Sessions



Personal Finance Game

Students answer questions through an online quiz platform with real-time results. If over 30% answer incorrectly, the game pauses for a brief review of the relevant concepts. Questions are offered at Beginner and Advanced levels.



Panel Session

Students engage with finance experts and YIS alumni to discuss topics such as bear vs. bull markets and public vs. private equity, gaining deeper insights and expanding their global perspective.



Finance Workshop

Students participate in interactive workshops and fireside chats led by global finance leaders, learning investment and risk management strategies while exploring industry trends and career paths.



Networking Session

Students connect with peers and finance professionals worldwide, gaining insights and building valuable global networks.



3

Experience New York's Financial Vibe

As a leading global financial center, New York offers students a full immersion into its financial atmosphere. They will have the opportunity to visit top firms like **J.P. Morgan** and **Bloomberg**, iconic sites such as **Wall Street**, **NYSE**, and **NASDAQ**, and finance museums to experience the evolution of markets.



Past participants in the Global Round visited Bloomberg



Panel Session



Schedule

	Day 1	Day 2	Day 3	Day 4	Day 5
Morning		<ul style="list-style-type: none"> · Check in at Bloomberg building at Cornell Tech · Welcome an Opening Speaker · Workshops · Stock Pitch Round 1 	<ul style="list-style-type: none"> · Welcome and Intro for the day · Personal Finance Game · Stock Pitch Round 2 · Panel sessions 		
Afternoon	<ul style="list-style-type: none"> · Arrive in New York 	<ul style="list-style-type: none"> · Venture Capital Experience · Stock Pitch Round 1 (cont.) · Networking Session · YIS Alumni Panel; Round up meeting 	<ul style="list-style-type: none"> · Case study competition · Case study finals round · Closing Ceremony: <ul style="list-style-type: none"> -Awards -Stock Pitch Final Round -Keynote Speaker 	<ul style="list-style-type: none"> · New York City Tour 	<ul style="list-style-type: none"> · Back Home

* The schedule is for reference only and may be subject to change.



Academic Materials

Young Investors Society (YIS) offers a comprehensive academic support system, helping students build financial literacy and investment skills from the ground up.

Full Learning Cycle

Practical Tools

Real Cases

Globally Recognized

Learn

Core Theory

Stock investing 101 eBook

Co-authored by YIS and 30+ finance experts, this eBook covers the essentials of stock investing: golden rules, stock valuation, quality companies, investment logic, and intrinsic value. Includes Appendix & Glossary.

Video Learning Resources

- [YIS Unit Lessons](#)

Aligned with the Stock Investing 101 eBook, include interactive exercises to deepen understanding.

- [Investment Lessons](#)

Eight focused courses that break down core investment concepts and build a systematic investment mindset.

- [Personal Finance Lessons](#)

Strengthen personal finance knowledge, develop financial literacy, and acquire practical money-management skills.

Practice

Hands-On Training

- **Learning Handout:** Exercises aligned with the Stock Investing 101 eBook
- **Sample Stock Pitch Reports:** Learn from past top teams, helping students learn effective report logic.
- **Prep Videos:** Step-by-step guidance on report writing, presentations, and pitching.
- **Quantitative Tools:** Support calculations and analysis for informed investment decisions

Present

Presentation & Communication Support

- **Sample Previous Winner's Stock Pitch Presentations & Guidelines:** Turn financial data into clear investment logic and deliver a professional presentation.
- **Stock Pitch Report Template:** Provides report format, writing tips, and guidelines to help beginners get started quickly.
- **Stock Pitch Competition Videos:** Past Global Round champions' presentations for learning and inspiration.

Expand

Extended Reading & Knowledge Enrichment

- **Recommended Reading List:** Essential classics for every investor, helping students investing across a broader knowledge spectrum.
- **Suggested Finance Websites:** company research, financial data, stock screening, market intelligence, investment learning tools and stock performance tracking.





2025 Asia Round Participant Testimonials

Kickstart Your Future Career with Real Investment Practice

For my teammate and me, YIS was a perfect first experience that matched our interests. This mid-sized challenge allowed us to experiment flexibly while preparing and collaborating. From a college application perspective, it also helped us gain practical business experience—essentially proving our interest and potential through “real-world” practice.

— Li, Zhenjiang First Foreign Language School

What attracted me to YIS is that it offers a systematic, hands-on, and real-world-focused learning and competition platform. As a student aiming to apply for finance, economics, or business-related programs in the future, YIS was an excellent way to prepare. More importantly, it simulates real investment scenarios, allowing me to experience the challenges and appeal of the field firsthand and confirm whether I truly love and am suited for this path.

-- Vivian Xiang



More Than Awards: Gaining a Skill Upgrade Package

The biggest takeaway was “finding direction.” During the process, I gradually realized that I am more interested in “soft finance”—this kind of exploration is far more valuable than just learning knowledge. My presentation and analysis skills also improved with every session, as each presentation required refining logic and designing delivery, training me to communicate professional content clearly and persuasively.

— Cheng, Dalian Yuming Senior High School

The Committee Session (extremely impressive) helped me fully grasp and apply financial knowledge. It vividly simulated the scenario of an investment committee making final decisions, allowing me to personally experience the challenge and sense of accomplishment behind successfully persuading others.

— Zhang, International Department of Beijing No.35 High School

Immersive Investing: Simulation and Decision-Making Skills

The most memorable part was probably the three-round SEC stock exchange challenge. Our initial returns were not ideal, but after each round, my teammate and I reviewed and analyzed our mistakes, finding ways to improve—even during the test round. In the end, we managed to turn things around. This segment really tested our ability to analyze each stock, interpret news, organize company details, and collaborate effectively as a team.

— Wang & Liu, RDFZ XISHAN SCHOOL

Master valuation models, stick to deadlines, and use report templates to cover peer comparisons (like IonQ vs. Ibm). Working solo? Double-check data-no teammates to catch gaps! If you don't have one ;D

--Ruan, HARROW LIDE SCHOOL HENGQIN



YOUNG INVESTORS SOCIETY Global Stock Pitch Competition

YIS

*Someone's sitting in the shade today because someone
planted a tree along time ago.*

— Warren Buffett

ASEEDER

Beijing: Room 9-6, Tower A, SOHO Phase II, Guanghua Road, Chaoyang District
Shanghai: Room 1702, Building 2, Kaide Guozheng Center, No. 489 Zhengli Road, Yangpu District
Shenzhen: 2712-2713, 27F, Baoshan Times Building, Longhua District
Chengdu: 21F, LIPPO TOWER No.62 North Kehua Road, Wuhou District
Hotline: 4001-699-686
Website: <https://www.seedasdan.com/yis/>
Email: investor@seedasdan.org



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