

STOCK|TRAK TRADING GAME

OVERVIEW

Over the course of the semester, you will construct and monitor a \$250,000 portfolio of equities, derivatives, ETFs, and mutual funds. While you are *free to trade however you'd like at any time*, you must satisfy trading requirements as defined in the following Trading Assignments (TAs):

Assignment	Description	Timing	Points Possible
TA 1	Invest in Growth and Value Stocks	First 5 weeks of the course	8
TA 2	Place Price Contingent Orders		8
TA 3	Buy Call and Put Options		8
TA 4	Invest in ETFs and Mutual Funds		8
TA 5	Provide Updates and Open Trading	Weeks 6-14	5
TA 6	Reflect on Performance	Week 15	8
<i>Performance*</i>			1 to 5
Total Points			50
<i>Bonus Points (if raw % performance better than professor)</i>			+3
Total with Bonus			53/50 = 106%

I will provide Trading Assignments (and due dates) in class.



Late assignments receive no credit. However, the assignments build on each other: failure to turn in TA1 might result in points lost on TA2. If you do not complete a Trading Assignment on time, it is still important for you to complete the required tasks of that assignment (even if it is late) so that you do not lose points in the future.

*A very small percentage of your grade is based on your performance relative to the class, as shown in the table below. *Even if you are the worst performer, an "A-" for the Trading Game overall is possible!*

Performance (raw percent change)	Points	Max Score Possible Before Bonus
5 th Quintile of Class (Top 20%)	5	50/50 = 100%
4 th Quintile of Class	4	49/50 = 98%
3 rd Quintile of Class	3	48/50 = 96%
2 nd Quintile of Class	2	47/50 = 94%
1 st Quintile of Class (Bottom 20%)	1	46/50 = 92%

3 bonus points will be added to your score if your performance is better than the professor (who must trade following the same rules as you). For example, if you were in the 3rd Quintile of performance but had a higher percentage return than the professor, your max possible score would be $48 + 3 = 51/50 = 102\%$.

GRADING PHILOSOPHY

If you complete all tasks in each of your assignments on time, provide *reasonable and thoughtful* discussions, and submit properly (uploaded as a PDF and named correctly), I expect to award full credit.

However, naming your file improperly is a 1-point deduction per occurrence. Failing to upload as a PDF is a 1-point deduction per occurrence. Other points may be lost for poor grammar and spelling, low effort in your discussions, and failure to make trades according to the directions.



You will receive your score for all Trading Assignments 1 – 6, as well as your overall score, at the end of the semester.

REGISTRATION LINK & USER GUIDE

To register, visit the link below. *Your username must be an available combination of your first and last name (i.e., wbuffet, emusk, jeffbezoz) and will be publicly viewable in the class leaderboards.*

Registration begins Tuesday, 8/23

Trading begins Thursday, 9/1

Trading ends Thursday, 12/1

www.stocktrak.com:443/members/register?session=UR-FIN366-FALL22

A user guide for Stock|Trak is available here:

content.stocktrak.com/stocktrak-student-user-guide/

GETTING STARTED WITH TRADING

I encourage you to visit the “Resources” tab on my website. The Finviz Screener is useful for narrowing down stocks while Morningstar helps with analysis. Good luck!