

The Stock Market Challenge Planning Guide



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Section 1: The Premise of the Event.



#1. Teams are given \$500,000 and descriptions of fictitious stocks which they use to create the Portfolio of their choice. Once the market is open everyday is only 80 seconds long!
Teams trade for two 30 day periods. (80 minutes in total.)

#2. Three screens display, team standings, how much cash teams have on hand, their overall portfolio net worth, changing share values for stocks, and the overall history of every single stock in graph form. All information is updated in real time.



#3. When teams decide to buy or sell stocks they must attract a “floor trader” to their table in order to make a transaction. All “floor traders” are equipped with hand-held P.C.’s which enter teams transactions instantly into the system via wireless transmissions. There is 1 “floor trader” for every 4 teams.

#4. Throughout the event teams are given News Releases and analysis giving them insight into the possible performance of stocks. How well teams interpret this information and react to it is imperative to their success.



#5. After 60 simulated days on the market the team with the highest portfolio net worth is crowned the Stock Market Challenge Champion!



RULES OF PLAY

- **Every corporate team of four members will begin with \$500,000.00**
- **Every day is 80 seconds long.**
- **Fictitious company names, call letters and a brief description are provided to enable teams to identify the 26 stocks available.**
- **Video screens will provide the following information: Team Net Worth, Daily Stock Prices, Trading Days from 1 to 60 and Graphical Depictions of Stock Performance.**
- **All trades are made through Floor Traders.**
- **To easily track your portfolio, we suggest that you buy and sell shares in even lots, i.e. buy 1000 shares of Company A or \$10,000 worth of Company A shares.**
- **Portfolio statements may be obtained from any of the printing stations, at any time.**
- **Information on stocks in the form of News Releases and Hot Tips is available on specific days. Your Emcee will inform when these items are available.**
- **Team members should make trading decisions collectively.**
- **All trades made after the initial stock picks at pre-registration will be subject to a trading commission of 1.25%.**
- **Trading will commence with the ringing of a bell; continue for approximately 40 minutes at which time there will be a 10 to 20-minute break. Trading will re-commence for another 40 minutes and finish at the ringing of the bell.**

Section 2: Packaging the Event

Aim High!

When canvassing for sponsor's and teams aim high with your pricing. The Stock Market Challenge is a very unique, extremely high-tech interactive simulation and this will be one of the biggest events in your area.

If this opportunity is conveyed properly then you should have no problem securing top dollar from interested parties. Remember: there is only 1 Stock Market Challenge, so the opportunity for sponsors in your area is a unique one.

5 Sponsors!

You should be able to secure 1 Title Sponsor and 4 Corner Stone Sponsor. Your committee should obtain sponsors/teams through peer to peer meetings, instead of print or web-based advertising. We suggest a 4 month lead up time prior to your event date to ensure proper sponsorship can be obtained.

Title Sponsors: \$5,000.00 to \$35,000.00

1. Share the title of the event. For ex: ***BIG COMPANY*** Annual Stock Market Challenge!
2. Offer Dominant Logo Exposure on Screens.
3. A Stock Name in Event (note: a successful stock performance can be assured).
4. Dominant Logo on all News Releases.
5. Their own "floor trader," in the event.
6. A "VIP" table. Comfortable seating, drink runner, champagne etc.
7. Opportunity to open or close the market. 4 Bells are rung throughout the event to open and close each half of trading.
8. Present awards following event.
9. Dominant logo exposure on all materials canvassing for the event.
10. Invite Media to the event. Pictures of awards presented in front of logo.

Corner Stone Sponsors: \$2,500.00 to \$20,000.00

1. Logo exposure on Screens.
2. Logo exposure on clothing worn by "Floor Traders." You can create T-shirts for the traders, or for guests in an inexpensive manner.
3. Stock name in event.
4. Premium table.
5. Their own "floor trader," in the event.
6. Logo exposure on all materials canvassing for the event.
7. Present awards to 2nd or 3rd place team.

Team Registration: Sold for \$500 to \$5,000.00

1. Committee should be formed **4 months prior** to your event date.
2. Your committee must decide the total number of teams they will obtain.
3. Generally 25-50 teams creates the correct environment for the SMC.
4. Assign a specific number of teams for each committee member with progress noted at each meeting.
5. Some organizations have staggered seating, charging more for tables closer to the screens.
6. Some organizations have packaged all the information available during the event (News Releases, Hot Tips, Portfolio Printouts etc.) and presold as a higher registration value for teams. It has been termed the “Blue-Chip Package” or “Gold Package.” You can also add more cash to start, where teams can start with an additional \$200,000 if they pay a higher Registration Price.

Stocks: Sold for \$250 to \$1,000

1. There are 26 Stock Positions available, which you can sell to local companies. Fun-Raiser can guarantee that their stocks will perform well. What a great way for you to build new relationships and for them to advertise! Some clients have been able to sell each stock position for \$1000 a piece.

Information sold inside event: Sold for \$10 to \$25 inside event.

1. All information (4 News Releases, 10 Hot Tips, Portfolio Statements) is available at a cost determined by you.
2. All of this information will be provided to you by Fun-Raiser and it is **your responsibility** to pre-print these materials and bring them to the event.
3. Some organizations will sell all of this information in one convenient package. Ask Fun-Raiser how best to prepare and sell these packages.

News Release Sponsor: Sold for \$2,500 to \$5,000

1. The 4 News Releases each contain 5 articles on 5 different stocks. In total, information on 20 different stocks are referenced in fictitious articles, and give teams pertinent information on which way these stocks are turning. This information is linked to our software and is guaranteed to help teams that consider them seriously, and invest. Finding a Media company or Business Publication to become the News Release Sponsor is a perfect fit.

Hot Tip Sponsor: Sold for \$2,500 to \$5,000

1. 10 Hot Tips are available throughout the event and give teams a quick summary of where 1 stock is going. Brokerage firms, Financial Advisors, or Business Publications are all perfect for this type of sponsorship.

Trading Dollars: Sold at price determined by you.

1. Teams can trade real money for trading dollar inside the event.
2. These trading dollars are purchased through the printing stations.
3. Generally the exchange is \$20 for \$20,000TD, \$40 for \$60,000TD, \$75 for \$120,000TD, and \$100 for \$200,000TD but can be adjusted to any ratio desired. Please tell Fun-Raiser prior to your event if you would like to alter these ratios.

“Floor Trader” Sponsorship: Sold for \$2,500 to \$10,000

1. The ratio for “Floor Traders” to Teams is 1 to 4. That is 1 volunteer (that Fun-Raiser trains) for every 4 teams. When teams wish to buy or sell stock they must get the attention of their floor trader by yelling “Trader Trader.” Traders then run to their table and make trades through hand-held wireless PC’s. All information on screens is then updated instantly. Competition for traders is intense and helps to create the chaos of the old stock exchange floor. This means that “Floor Traders” are an integral part in the Stock Market Challenge.
2. In obtaining sponsorship for this facet of the game you can offer dominant logo exposure on T-shirts created for event.
3. Logo on screens.
4. A Stock position.
5. Fun-Raiser’s software creates statistics on overall amount of trades, total dollars traded, highest transaction by which team on which day. These statistics are given at the start of the 2nd half and at the end of the game. Your “Floor Trader” sponsor could report these statistics to teams from the podium.

Hospitality Sponsor: Sold for \$2,500 to \$5,000

1. The night of the event, teams arrive one hour prior to the opening bell. As many work in the same industry they can network, or teams can examine stock list and description which you will print off an place on each table. Generally finger foods and a bar are available to guests.
2. In obtaining this type of sponsorship you can offer logo exposure on screens.
3. A Stock position.
4. Allow them to place their business card on every table. It’s a great way for them to advertise themselves within the financial community.

Student Event Sponsor: Sold for \$10,000

1. Premier Sponsor sold for \$10,000-logo exposure-stock-opening remarks.
2. Individual Teams sold for \$1,000 each to local businesses. Teams can wear T-shirts with their sponsors logo on them. Sponsors can attend, and assist teams.
3. Media invited to student event creating great exposure for all sponsors.

Note:

On the night of the event please ensure that you have the ability to make correct change and to take and process credit cards should guests choose to run a tab.

Seating Sections:

1. Auction a VIP table off at the beginning of both halves, offering their own personal floor trader and free drinks with drink runner.
2. Sell staggered seating where those closer to the screens are sold at a higher value with more access to “floor traders,” or beginning with more than \$500,000. (For Example: \$600,000 or \$700,000).

Prizes:

1. Source sponsored prizes for teams over and above general sponsorship.
2. Website for popular ticker tape trophies:
http://bullandbear.bizhosting.com/ticker_machines.html

Expenses	Value	Expenses in Kind
Fun-Raiser Event Fee	\$7,500.00	
Fun-Raiser Travel Cost	\$1,000-\$2,000	?
Audio Visual-3 Screens	\$1,500	?
Table Rental	\$1,500	?
Catering	\$1,000 to \$3,000	?
Estimated Total:	\$12,500-\$17,500	Alternative Sponsorship
Revenue	Value	
Title Sponsorship	\$15,000	Hospitality Sponsor:\$5,000
Premiere (student) Sponsor	\$10,000	Floor Trader Sponsor:\$10,000
Corner Stone Sponsor (4)	\$20,000	Hot Tips Sponsor:\$1,500
Registering Teams (30)	\$30,000	
Register VIP Teams (5)	\$4,500	
News Release Sponsor	\$2,500	
Estimated Total:	\$82,000	\$16,500

Section 3: Venue and Logistics



Venue:

- Coordinate with Fun-Raiser to book your event date and venue simultaneously.
- 200 guests (50 teams of 4) will require a room approximately 5,000 to 7,000 square feet in size.
- Ceiling height should be 15 feet high so projection screens can be raised 5 feet off the ground. This will ensure teams can view all information on screens.
- If you are hosting an afternoon student event Fun-Raiser may need to access your venue the night prior to your event. It takes 3/4 hours to set up.
- Fun-Raiser does not require any special power hookups and we provide all of our own cables, power bars extension cords etc.

Audio Visual Requirements:

- Three 9' x 12' backlit screens with pipe and drape (rent from AV company).
- AV company must set up and dismantle all screens.
- Depending on size of your event and venue you may go with smaller screens. Contact Fun-Raiser to discuss your options.
- Leave 25-30 feet behind screens to allow for throw space on rear projection. Drapery is necessary to prevent traffic behind the screens and to ensure equipment and cords, etc are well hidden. To calculate how much space Fun-Raiser needs behind the screens, double the width of your screen and add two feet, i.e. For a 10ft x 14ft screen, Fun-Raiser requires 30ft of space.

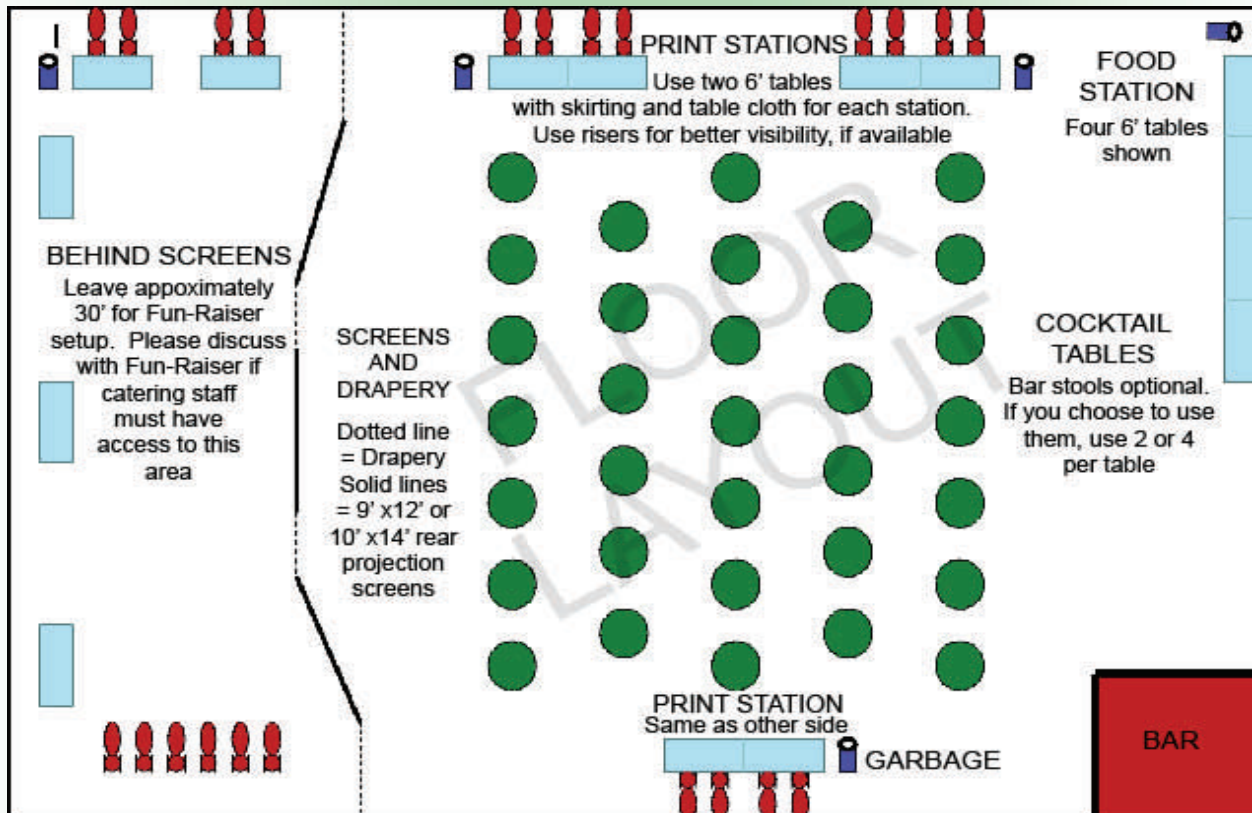
Tables:

- Arrange to have 'Cocktail Tables' with linen & **table numbers** to be delivered and set up. You may want to supply some chairs around the room although they are not necessary.
- **Table numbers** are imperative as each team's ID corresponds with the individual table numbers.

Other:

- Three tables and one chair must be set up behind screens for projectors and computers.
- Lighting should be subdued so that information on the screen can easily be seen.
- It is recommended that the Emcee have a hand held wireless microphone.
- A podium is useful but optional.
- On event night, have the ability to accept VISA, Master Card or Debit, if necessary. Also make sure you have cash boxes in order to make correct change.
- Catering normally consists of light appetizers and a bar.

FLOOR PLAN



Section 4: Checklist

Cut Off Dates:

- If you have chosen to sell “Stock Positions” you must give yourself a cut off date of no less than **3 weeks** prior to your event date.
- You must send all information regarding the “Stock Positions” to Fun-Raiser at this time, as Fun-Raiser will have to finalize your Stock List, News Releases, Hot Tips and Registration Workbook. **Note:** Every change to Stock List requires several amendments to other materials, as all things are linked.
- You will need to finalize 3 weeks prior to event so that registered teams can choose their stock picks and send you their information. Information you will then enter into the **Registration Workbook** provided by Fun-Raiser.
- Failure to comply with this dead line could result in having to use our generic game.
- **3 weeks** prior to your event date you must have obtained all your Sponsors. You must send Sponsors logos (Jpeg format) to Fun-Raiser at this time.
- You may sell and register teams up to 3 Days prior to your event.
- You must send the finalized Registration Workbook Fun-Raiser will provide you with (so that you can enter team names and stock picks) **2 Days** prior to your event.

Venue:

- When does Fun-Raiser have access to your venue?
- Set up takes 3/4 hours to complete.
- If you are hosting a student event Fun-Raiser may have to access your venue the evening before your event. Please discuss with Fun-Raiser.

Audio Visual Company:

- Coordinate with AV company for them to deliver, set up, and break down all screens, pipe and drape, and sound system.
- Ensure they have 3 screens, pipe and drape, and sound system set up and ready 4 hours prior to guest arrival.

Cocktail tables:

- Coordinate with AV/Rental Company to have them deliver, set up, and break down all tables. Remember that Table Numbers are essential.
- All tables should be covered in linens, preferably black.

Volunteers:

- 1 “Floor Trader” is needed for every 4 teams.
- 3 volunteers are needed for printing stations.
- A few extra volunteers to deliver or sell information are always valuable.
- All volunteers should arrive 30 minutes prior to guest’s arrival time for Fun-Raiser to train.
- The Emcee should arrive 30 minutes prior to opening bell to discuss nuances of event with Fun-Raiser.

Fun-Raisers Accommodations:

- Book hotel accommodations for Fun-Raiser and send hotel address and confirmation numbers to Fun-Raiser one week prior to your event.

Bring to Event:

- **Printing Paper:** 3 to 4 reams/stacks of inexpensive paper for printing stations.
- **Name Badges:** The name badges **MUST** be 2 ¼” x 3 ½” in size. Make sure they are inkjet/laser printer kind. Purchase enough for all guests + volunteers and make sure there are extras just incase. If you choose to print your own, you will not need these.
- **Printed Copies of News Releases & Hot Tips for Teams:** 1 copy per team.
- **Prizes.**
- **Script for all speakers.**
- **Up-tempo music for event:** Speak with Fun-Raiser if you wish for us to supply music.
- **Final Check for Fun-Raiser. To be presented to Fun-Raiser prior to the opening bell.**