



miniEnterprize

2024 Stock Simulation Package

Western Canada's Largest Business Case Competition



The 16th Annual Conference
UBC Sauder School of Business

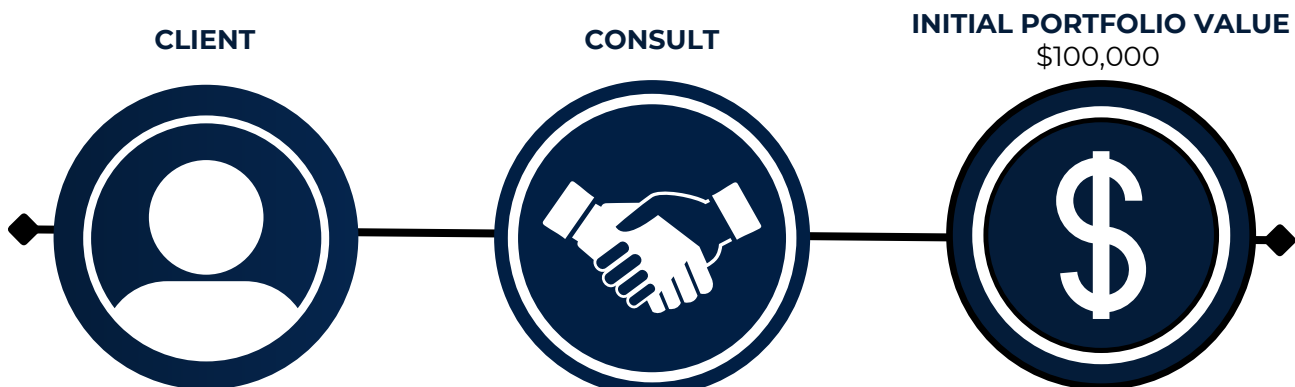
Introduction



CLIENT PROFILE: GRACE COOPER

You have just been hired as a portfolio manager at the miniEnterprise Asset Management Firm, a newly founded asset management company focusing on personal finance management. As a newly hired analyst, your job is to manage a portfolio based on the client's unique challenges. Your first assignment as an analyst is to design a portfolio worth **\$100,000**.

The current manager of the miniEnterprise Asset Management Firm has consulted a new client, Grace Cooper, on October 2nd, 2023, to discuss options to help Grace meet her financial needs. As a recent retiree, Grace is ready to embark on a new chapter of her life filled with travel, adventure and relaxation. That being said, Grace also has increased responsibilities including taking care of her five grandchildren's college fees, retirement home costs and medical bills. Based on Grace's current assets and pension, she has enough money saved up to meet her daily housing and medical needs. However, her costs do not cover her future savings for her grandchildren's education costs which she hopes to give to her grandchildren in 6 years. Grace is looking to invest funds to ensure she can support her grandchildren's education costs in the future.



Introduction Cont.



COOPER'S BUSINESS ENDEAVOURS

Before retiring, Grace served extensively with local non-profits, working in organizations such as the Food Bank, World Wide Fund for Nature, and Local Women's Shelters, where Grace found a passion advocating for Environmental and Social change. In her daily life, Grace has prioritized purchasing from local businesses with strong corporate social responsibility and high ESG ratings. Grace's investment philosophy is no different, with her priority being on allocating her investments on socially responsible companies.

PORTFOLIO REQUIREMENTS

After a long and successful negotiation, Grace has entrusted the miniEnterprise Asset Management Firm to manage her \$100,000 portfolio while following Grace's two investment stipulations. As this portfolio is dedicated to financing her grandchildren's education, Grace would require **at least half** of her funds to be allocated into long term investments with consistent revenue growth and a relatively low risk rating.

However, the remaining portion of this portfolio can be allocated to companies with high growth potential. Moreover, while designing Grace's portfolio, she wants to ensure at least **30%** of her investments are made with socially responsible companies. Whether these companies set environmental targets, have social commitments and/or ranked high on ESG or CSR ratings, Grace trusts you, as an analyst, to make the right decisions on investing in socially responsible companies. Although not required, she would also be delighted to see some money allocated into Canadian companies.



The Challenge



CHALLENGE

Grace's portfolio has now been transferred to your supervision, and you will have four months to invest Grace's **\$100,000** into whatever companies you see fit, to bring a safe, long-term investment back. Keep her expectations of a long-term focus in mind as you work on your portfolio and assessing risk. Do not emphasize short-term profits over safer investments. Ensure that you fulfill her request of investing at least 30% of her portfolio in environmentally responsible companies, those that support global human rights, and those with a social responsibility agenda.

After the challenge closes, you must also submit a brief report, no more than a page in length, justifying your major investment decisions and how they relate to Grace's financial targets. Keep in mind that as a portfolio manager, you may be tasked with adjusting the portfolio if client challenges occur.

The winner of miniEnterprize 2024's stock trading competition will be awarded **\$500**, as determined by the following criteria.

CRITERIA

- **Return rates:** what was your placement in the final investment competition? (40%)
- **Expectations:** did you fulfill your client's expectations in your investments? (10%)
- **Report:** how comprehensively does your report justify your investment decisions? (30%)
- **Adaptability:** did you adjust the client's changing needs? (20%)

Please email conference@minienterprize.org with questions about the case, judging, or report.

Simulation Instructions



SETTING UP INVESTOPEDIA

The 2024 miniE stocks simulation will be conducted entirely on Investopedia, a user-friendly simulation platform.

To join the official trading simulation, follow the instructions on the website to create an Investopedia account. Once you have created an account, please press on the game tab and search for MiniEnterprize2024. However, if you are experiencing any technical difficulties, do not hesitate to email, conference@minienterprize.org.

Website: <https://www.investopedia.com/simulator/>



Key Dates



Key Dates	Events
10/04/2023	Registration Opens, Case Released
10/11/2023	Registration Closes
10/12/2023	Trading Begins
12/29/2023	Report Submission Opens, Last Day of Trading
01/12/2024	Report Submission Closes
February 2024	Winners are Announced during Conference

Rewards



Placement	Amount
1st Place	\$500
2nd Place	\$100
3rd Place	\$50

Contact Us



If you have any immediate questions or concerns, please do not hesitate to reach out to one of the contacts below.

Caleb Jang, Director of Conference | conference@minienterprize.org

Michael Toy, Chair | chair@minienterprize.org

Website | minienterprize.org

Facebook | facebook.com/minienterprize

Instagram | instagram.com/minienterprize

YouTube | youtube.com/minienterprize

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