



miniEnterprize

2023 Stock Simulation

Introduction



CLIENT PROFILE: ANDREA LUI



You have just graduated college and been offered a position at miniEnterprise Asset Management (mEAM), a newly-found asset management company specializing in overseeing recent university graduates' investments. One particular portfolio worth \$100,000 is being invested across five different sectors representing multiple industries. Although you are a new analyst, you have big aspirations of rising through the ranks to eventually make final decisions for mEAM's portfolio.

The current manager of mEAM's portfolio, Jason Aurum, met up with an interested client, Andrea Lui, on September 29, 2022, to discuss how mEAM can help Andrea meet her financial targets in the coming years. As a graduate of the University of British Columbia's Sauder School of Business with a Bachelor of Commerce specializing in real estate, Andrea is also a hobbyist book collector, exercise enthusiast, and climate justice advocate. As such, her current home, a small apartment rented for \$1700 a month, is growing increasingly cramped with bookshelves and equipment. Andrea is looking to save enough to afford a home valued at around \$1,000,000 somewhere in Canada as her first priority.

Initial Portfolio
Value
\$100,000

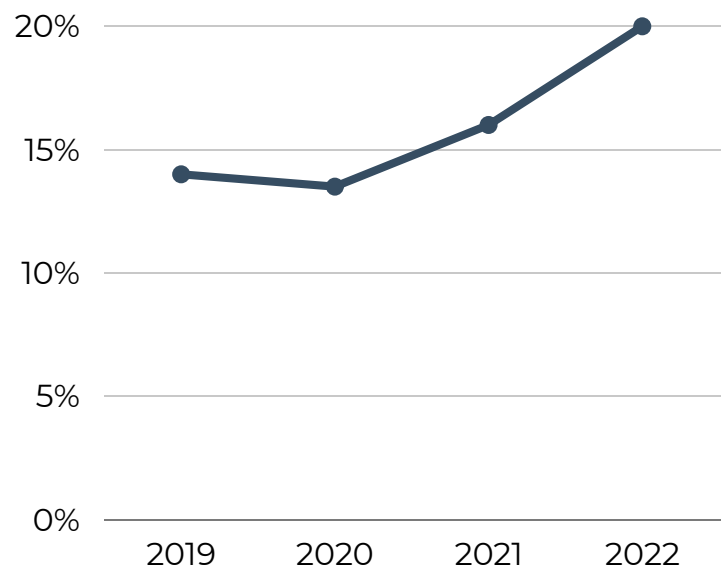
Introduction Cont.



ANDREA'S BUSINESS OPERATIONS

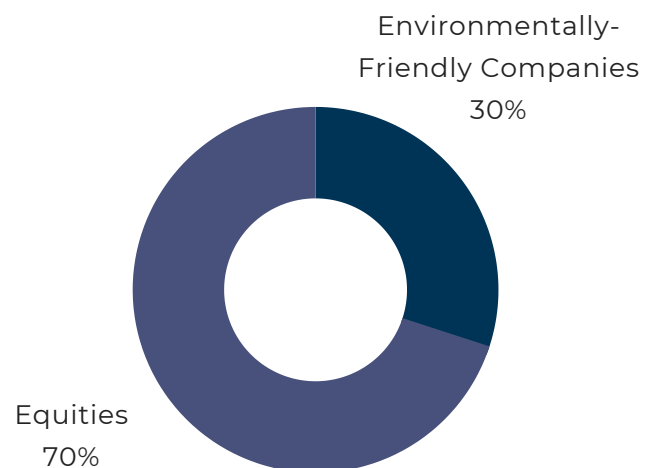
Moreover, Andrea is currently the manager of The Crystalline, a small eco-friendly tea shop in Vancouver, where she is responsible for the day-to-day operations of the business and upholding the value of environmentalism in her tea products. The Crystalline's high-profit margin of 20% in the past year has saved up just enough funds for expansion, and Andrea is looking to start a second location somewhere in the city. However, expanding would mean depleting her business of all its excess reserves and leaving it vulnerable to any economic shocks. With this difficult decision in mind, Andrea decided to consult mEAM after seeing an ad for its services on Facebook, hoping that the company will be able to manage her portfolio in the meantime as she focuses on expanding her business for the foreseeable future.

MEASURE OF THE CRYSTALLINE'S
PROFIT MARGIN 2019-2022



PORTFOLIO REQUIREMENTS

After a long and successful negotiation, Andrea is convinced that mEAM will be able to manage her \$100,000 and invest them in helping her achieve her two goals of moving into a new home and safely expanding her business. Although she is willing for mEAM to make riskier investments given her high savings and The Crystalline's success, she is wary of investing in start-up companies and would prefer the majority of her funds go to safe and long-term investments for the upcoming year rather than short-term profits. Moreover, being a strong environmentalist, Andrea is requesting that up to 30% of her portfolio be invested in environmentally-friendly companies actively seeking to bring an end to climate change.



Simulation Instructions



SETTING UP INVESTOPEDIA

The 2023 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 miniE2023. The password for joining the game is "miniE2023 ". However, if you are experiencing any technical difficulties, do not hesitate to email, logistics@minienterprize.org.

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

Password: miniE2023



Rules & Guidelines



CHALLENGE

Andrea's portfolio has now been transferred to you, and you will have approximately two months to invest Andrea'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 assess risk. Do not emphasize short-term profits over safer investments. Do also ensure to fulfill her request of investing in environmentally-friendly companies. After the challenge closes, you must also submit a brief report, no more than a page in length, justifying the major investment decisions that you have made and how they relate to Andrea's financial targets and expectations.

CRITERIA

- **Return rates (60%):** What was your placement in the final investment competition?
- **Expectations (10%):** Did you fulfill your client's expectations in your investments?
- **Report (30%):** How comprehensively does your report justify your investment decisions?

Timeline



Key Dates & Events	
09/15/2022	Registration Opens
10/05/2022	Registration Closes
10/05/2022	Case Release
10/06/2022	Trading Begins
01/20/2022	Report Submission Opens
01/31/2023	Last Day of Trading
02/01/2023	Report Submission Closes
02/26/2023	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 with one of the contacts below.

Eric Pan, Director of Logistics | logistics@minienterprize.org

Owen Hu, Director of Conference | conference@minienterprize.org

Kelly Zeng, Chair | chair@minienterprize.org

Website | minienterprize.org

Facebook | facebook.com/minienterprize

Instagram | instagram.com/minienterprize

YouTube | youtube.com/minienterprize



@minienterprize



miniEnterprise

The 15th Annual Conference | UBC Sauder School of Business