



Arizona Stock Market Game Challenges

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Diversified Portfolio – ASSET Classes

Eligibility for a diversified portfolio is based upon the following information

Definition: The three main asset classes are equities (stocks), fixed-income (bonds) and cash equivalents (money market instruments).

While the SMG is a great experience and exposure to the markets, we retain the long term goal of teaching our students the longevity of starting early and diversifying their investments. Not only seeking a variety of different industry groups, but being invested in a variety of different ASSET classes.

Investing in ASSET class begins with the following types of capitalization in the marketplace

Large Cap: \$10 billion plus and include the companies with the largest market capitalization.

Mid Cap: \$2 billion to \$10 billion

Small Cap: Less than \$2 billion

It then is followed by investing in Bonds (government, corporate or muni) and ETF's or Mutual Funds

Read more about ASSET Class Diversification @ [Investopedia](#)

Priority to placement in the Diversification – ASSET competition will go to the team that has the highest portfolio value and who held on to the investments the longest. Top portfolios will be reviewed at the end of the simulation until a winner is determined.

Large Cap, Mid Cap, Small Cap, Bonds (Bought in \$varying increments – see bond section) and ETF/Mutual Funds

Example of Portfolio

The screenshot shows a trading platform interface. At the top, there is a navigation bar with 'MENU', 'Trading', and 'HELP'. Below this is a menu with options: 'Account Summary', 'Pending Transactions', 'Account Holdings', 'Transaction Notes', 'Enter A Trade', 'America's Indices', 'Investor Research', and 'Transaction History'. A button labeled 'Toggle Print Mode Currently:complex' is visible below the menu.

Account Holdings for Team ID:AZ_17_A23 Date: 12/15/2010

TICKER	Position	Shares or \$Value	Last Trade Date
CMG	Long	100	2010-12-09
COKE	Long	100	2010-11-18
C419H.218.87	Long	\$5,000	2010-11-04
GLD	Long	100	2010-10-19
AAPL	Long	100	2010-10-08
TQQQ	Long	100	2010-10-08
FOSL	Long	100	2010-09-30
HAS	Long	100	2010-09-10
NFLX	Long	100	2010-09-10
TOTAL			

Stocks: CMG, GLD, AAPL, FOSL, HAS, NFLX

Bonds: C419H.218.87 (Bonds are bought in varying increments)

ETF/Mutual Fund: TQQQ

Take Stock in Arizona

Eligibility for a diversified portfolio is based upon the following information

Purpose: Students invest in local companies, municipal bonds and investments that have an effect on both the state but on the larger community as well.

While the SMG is a great experience and exposure to the markets, we retain the long term goal of teaching our students the longevity of starting early and diversifying their investments. The Arizona Stocks Only challenge allows students to connect locally and invest in things they know.

Students must only invest from the following companies listed at [Bloomberg's regional index](#) (List changes at times) **Corporate bonds** may also be purchased focusing on Arizona companies. (see the section on investing in bonds)

Priority to placement in the Arizona Stock competition will go to the team that has the highest portfolio value with Arizona stocks and bonds. If any purchases were made outside the focus of Arizona companies, the portfolio will be disqualified. A tie will go to the team who held on to the investments the longest. Top portfolios will be reviewed at the end of the simulation until a winner is determined.

Example of Portfolio

The screenshot shows a trading platform interface. At the top, there is a navigation bar with 'MENU', 'Trading', 'HELP', and 'Mutual Funds'. Below this is a menu of links: 'Account Summary', 'Pending Transactions', 'Account Holdings', 'Transaction Notes', 'Gains and Losses', 'Enter A Trade', 'America's Indices', 'Investor Research', 'Transaction History', and 'News Update'. A button at the bottom left says 'Toggle Print Mode Currently: complex'.

Account Holdings for Team ID:AZ_22_A16 Date: 12/15/2010
this game has ended (final holdings will be posted by 7 AM 12/04/2010)

TICKER	Position	Shares or \$Value	Last Trade Date	Net Cost per Share or \$100
UHAL	Long	400	2010-11-03	\$84.9966
UNS	Long	300	2010-11-02	\$36.3732
AVT	Long	100	2010-11-01	\$30.7683
PETM	Long	350	2010-10-26	\$36.7470
FCX	Long	300	2010-10-21	\$95.2102
MCHP	Long	200	2010-10-05	\$31.8852
TOTAL				

All Stocks listed are Arizona Stocks.

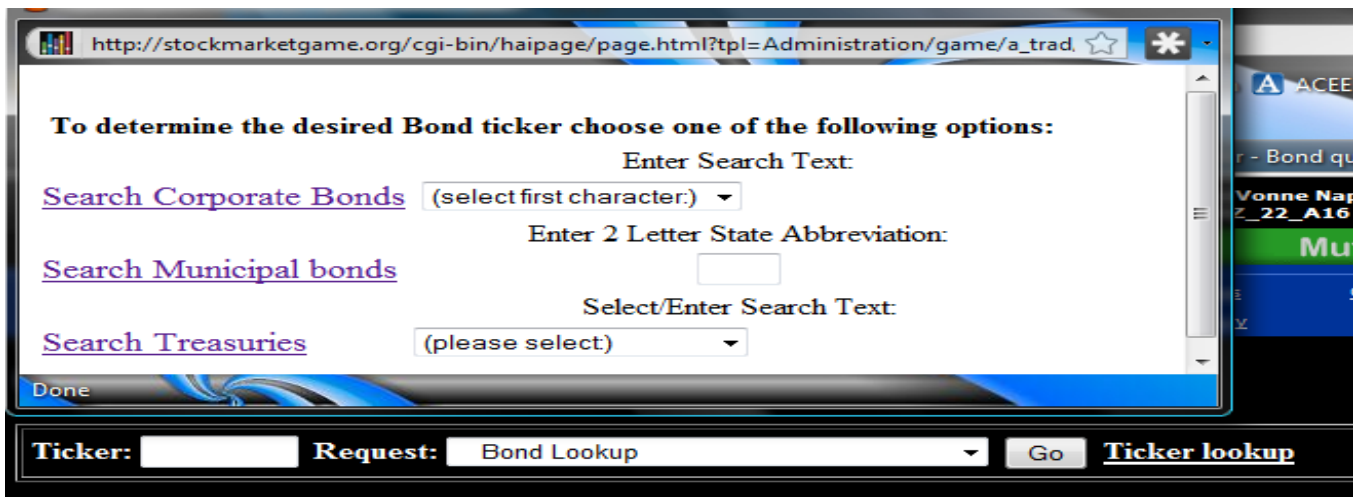
Investing in Bonds

Bonds

- Corporate Bonds purchased in \$1,000 increments
- Municipal bonds purchased in \$1,000 increments
- Treasuries purchased in \$100 increments

Under the Research Tab of the SMG you will find the search button for bonds

3 choices exist: Treasuries, municipal and corporate bonds.



The screenshot shows a web browser window with the URL http://stockmarketgame.org/cgi-bin/haipage/page.html?tpl=Administration/game/a_trad. The page content includes the instruction: "To determine the desired Bond ticker choose one of the following options:". Below this are three search options, each with a corresponding form field: "Search Corporate Bonds" with a dropdown menu labeled "(select first character:)", "Search Municipal bonds" with a text input field labeled "Enter 2 Letter State Abbreviation:", and "Search Treasuries" with a dropdown menu labeled "(please select)". At the bottom of the browser window, there is a "Done" button. Below the browser window, there is a search bar with "Ticker:" followed by an empty text box, "Request:" followed by a dropdown menu set to "Bond Lookup", a "Go" button, and a link labeled "Ticker lookup".

To determine the desired ticker for Stocks and Mutual Funds choose one of the following options:

[Nasdaq](#)

[New York Stock Exchange](#)

[Reuters Power Search](#)

[Reuters Symbol Search](#)

[TheStreet.com Symbol Search](#)

Enter company name:

BONDS

[Research](#)

[Investing In Bonds](#)

[Standard & Poor's Bonds](#)

Additional Information

Students may find additional information on bonds [listed here](#) – Please note that they are listed differently on the SMG

Students may also find specific corporate bonds by using the site [investing in bonds](#) and then search the SMG under *Investor Search/bond lookup/search corporate bonds* to see if it listed.

Many good lessons online at the SMG resource center on purchasing bonds and how to find a profitable one

Click on *SMG Investor Research/Click the Help button on top/Stocks and Mutual funds page link to bonds research help*