

JUDGE'S EVALUATION FORM

Event: Stock Market Simulation – Portfolio Presentation

Portfolio Presentation	Exceeds Expectations	Meets Expectations	Below Expectations	Little/No Value
Investment Thesis & Objectives <i>Clear goals, coherent philosophy, articulated strategy</i>	Crystal clear thesis with specific, measurable objectives. Strategy is sophisticated and well-articulated.	Clear thesis with defined objectives. Strategy is logical and generally well-explained.	Basic thesis present but vague. Objectives lack clarity or specificity.	No clear thesis or objectives. Strategy is unclear or absent.
Score (0-14): _____	14-13-12	12-11-10-9-8	7-6-5-4-3	2-1-0
Portfolio Construction Logic <i>Rationale for stock selection, position sizing, and allocation decisions</i>	Every position has clear, well-reasoned justification. Sizing decisions are strategic and explained.	Most positions are justified with sound reasoning. Sizing generally makes sense.	Some positions explained but rationale is weak. Sizing lacks clear logic.	Cannot explain portfolio construction. Decisions appear random.
Score (0-14): _____	14-13-12	12-11-10-9-8	7-6-5-4-3	2-1-0
Strategic Adaptability <i>Ability to adjust strategy based on market conditions or new information</i>	Demonstrates thoughtful adaptation with clear reasoning. Shows flexibility while maintaining discipline.	Made appropriate adjustments. Can explain changes to strategy reasonably well.	Limited adaptation or changes lack clear justification. Some inconsistency.	Rigid strategy despite changing conditions, or erratic changes without rationale.
Score (0-14): _____	14-13-12	12-11-10-9-8	7-6-5-4-3	2-1-0
Data Interpretation & Financial Understanding <i>Ability to analyze and draw insights from financial data, metrics, and market information</i>	Demonstrates sophisticated understanding of financial metrics and market data. Interprets information insightfully and accurately.	Understands key metrics and can interpret data appropriately. Shows solid analytical capability.	Basic understanding of metrics. Interpretation is simplistic or incomplete.	Cannot interpret financial data. Little understanding of metrics or market information.
Score (0-14): _____	10-9	8-7-6	5-4-3	2-1-0
Diversification or Concentration <i>Clear rationale for portfolio approach, whether concentrated or diversified, aligned with stated investment philosophy</i>	Exceptionally clear justification for approach. Portfolio structure is intentional, strategic, and perfectly aligned with stated goals and risk tolerance.	Good justification for approach. Portfolio structure is reasonable and generally consistent with strategy.	Basic justification but lacks depth. Approach somewhat aligns with strategy but has inconsistencies.	No clear justification for approach. Portfolio structure conflicts with stated strategy or appears random.
Score (0-14): _____	14-13-12	12-11-10-9-8	7-6-5-4-3	2-1-0

Portfolio Strategy & Presentation Subtotal: _____ / 70

Communication Criteria	Exceeds Expectations	Meets Expectations	Below Expectations	Little/No Value
Clarity & Articulation <i>Ideas expressed clearly and understandably</i>	Exceptionally clear. Complex ideas explained simply and effectively.	Clear communication. Ideas are well-expressed and easy to follow.	Generally clear with some confusion or unclear phrasing.	Unclear communication. Difficult to understand main points.
Score (0-10): _____	10-9	8-7-6	5-4-3	2-1-0
Professional Presence <i>Confidence, poise, and engagement; all members participate</i>	Highly professional, confident, engaging. All members contribute meaningfully.	Professional and appropriate. All members participate, though unevenly.	Generally professional with lapses. Not all members fully engaged.	Unprofessional or one/some members don't participate meaningfully.
Score (0-10): _____	10-9	8-7-6	5-4-3	2-1-0
Q&A Responses <i>Quality of responses; all members participate meaningfully (For teams)</i>	Thoughtful responses to all questions. All members contribute meaningfully.	Professional and appropriate. Good responses. All members participate, though contribution may be uneven.	Generally professional with lapses. Basic responses. Not all members fully engaged.	Unprofessional or weak responses. One/some members don't participate meaningfully.
Score (0-10): _____	10-9	8-7-6	5-4-3	2-1-0

Communication & Presentation Subtotal: _____ / 30

Total Points: _____ / 100