



# Secret Investment Hacks

## Basic Background Information:

Audiences: Elementary school kids (age from 9–12 years old)

Site: Summer Camp

Duration: 6 weeks

Technology used: A web app that simulates real stock market, multimedia (video, audio records, journaling)

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# Understanding Goals



Setting goals is the first step in turning the  
invisible into the visible.



## Students will Understand...

### HOW TO INVEST WISELY

- How to trade in stock market
- Understanding different ways of evaluating value
- Understanding the unpredictability / risk management
- Understanding relations between money and real world events
- How to make decisions about investment

### MONEY AND ME

- Understand how financial decisions have outcomes on their future.
- Understanding your own risk tolerance
- What does it mean to invest? (e.g. stocks, currency, people, relationships, education)

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## **Performances of Understanding**



## Our tasks to achieve the goals

### Tasks for Students:

**Step 1:** Students will have a start-up capital(Virtual Money).

**Step 2:** Kids will pick more than more stocks to start with, and elaborate why they want to invest in these stocks.

**Step 3:** And they also need to summarize the outcomes of their investment.

**Step 4:** In the end, kids may vary a lot in the amount of money they own. And they can use the virtual money to trade some goods in the classroom provided by the instructors.

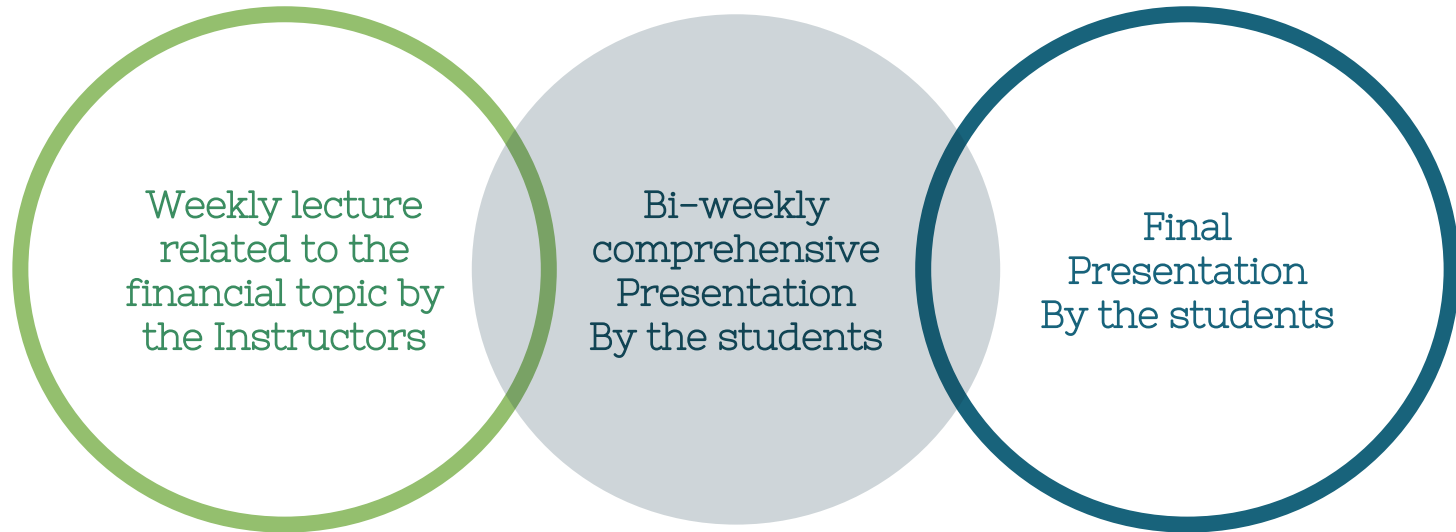
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### MONEY AND ME

- Understand how financial decisions have outcomes on their future.
- Understanding your own risk tolerance
- What does it mean to invest? (e.g. stocks, currency, people, relationships, education)
- Understand the function of money/trade

## Sophisticated performance practice: 3 Presentations





# Presentations

## Weekly class session

Instructors/teachers will give the students a weekly lecture related to investment topics.

Example: Imagine we went back to 1929 (stock crash) through a time machine; encourage students to think about why this thing happened and what would you do as an investor at that time.

## Bi-weekly Comprehensive Pre

This Pre should include:  
Self-assessment &  
Group Discussion &  
Financial Theory &  
Teacher's instruction

To showcase students' periodical takeaway of the learning process

## Final Presentation

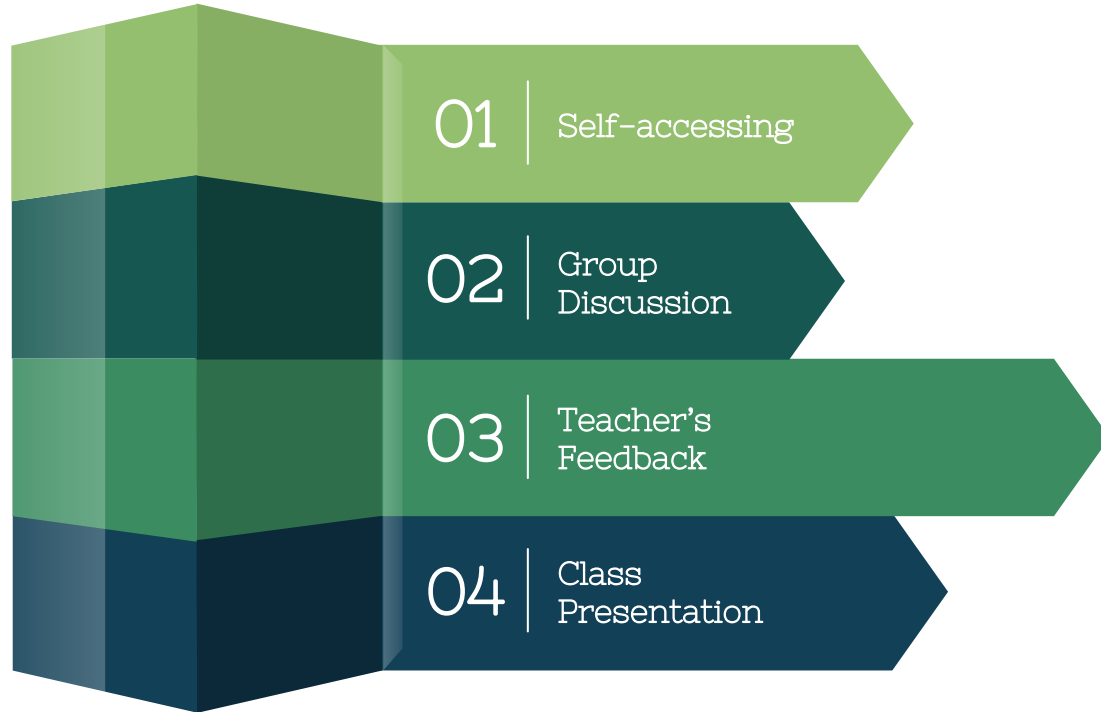
At last, students are asked to provide a well-thoughted assessment in front of class, that combines their own reflection, together with peers and teachers' opinions. More importantly students should provide other investing rookies their the insights and advices.

**Multimedia is especially welcomed in this pre.**

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# Assessment

# Assessment Process In General



## Sample Questions for Self-Assessment

### General Evaluation:

1. How will you evaluate your performances this week? (Excellent/Great/Neutral/Bad/Really bad)
2. Can you be more illustrative about the choice you made in question one? (Why would you assess yourself in that way and explain why)
3. What factors count towards your decision making?
4. What do you wish to improve/learn/understand/work on more in the following week?

### Goals:

5. What goals do you want to achieve during this process?
6. Do you think you are getting closer to your goals or do you think you are distancing from your goals? Why?

### Decision Making related/Psychological factors:

7. Do you think the amount of fund you have would affect your investment?
8. What would you consider before you are buying or selling stocks? Will you discuss with your peers?
9. Have you ever panicked? What would you do if you panicked?
10. Have you ever been excited? What would you do if you are excited?
11. Do you think those decisions you made while you were panicking or exciting are rational?
12. Do you think most of your decisions are rational? Why or why not?
13. How important is money to you?
14. Do you think you will be happy if you have lots of money that you can buy nearly everything?

## Sample Questions for Group Discussion (2-3 people)

Share your assessments with your peers that you haven't talked with in the previous week(s) and see what opinions they might have for you.

- Do you guys have things in common in terms of the decision making?
- Do you guys have similar goals and different goals?
- Why do you guys set goals in that way? Is it relevant to this course or is it more relevant to you individually?
- What do you guys agree and disagree upon?
- What suggestions would you give to each other?

## Teacher Assessment

Teachers will give construction suggestions based on what each student has written, the results of both self-assessment and group discussion.

## Class Presentation

- A well-thoughted 3-5 min presentation that combines self-assessment + group discussion + teacher's suggestions
- The classmates will give their own feedback for each presentation
- Each presentation would be focusing on **one topic**, such as “Do you think you are a good investor?”, “My tips on investing (if the student think him or herself as a type-A investor), “My experience on stock investing (How I fell?)”, etc.

Purpose: Encourage students to think...

- more critically on investing
- whether investing is something good for everyone
- whether they are good rational decision makers themselves
- what implications they might have towards other stuff in real life

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**Community**



## Reflective, collaborative communities

Support for  
Reflective  
Dialogue and  
Collaboration

Connecting  
academic work to  
authentic  
concerns

Hands-on  
to  
Minds-on





Thank you!!!