



Stock Trading Bootcamp

Prerequisite Notice: Completion of the *Investing Foundations* Course is required before enrolling in the Stock Trading Bootcamp. Those currently enrolled in the *Investing Foundations* Course are eligible to register, provided they finish the course before the Bootcamp begins.

This ensures students have the essential knowledge to succeed in our Stock Trading Bootcamp

Course Outline

Trading the stock market is one of the more emotionally charged investing activities. Success and failure can occur overnight. The biggest challenge to successful trading is to manage your own emotions. This course attempts to replicate those emotions by having the students make decisions about trades and then experience the outcome.

It is important to note that we are not investment advisors and cannot make any recommendations about investments that should or should not be made. For this course we will be investing Momentum Tailors capital only. We will not be asking students to invest any of their capital nor are we recommending that they make investments outside of this course. We will be reinforcing that if students wish to make any personal investments we cannot offer financial advice and they should discuss any investing plans with their parents or guardian.

At the start of the class Momentum Tailor will fund a trading account with \$1,000. Momentum Tailor staff will be the only people who have access to and the power to execute trades in that account.

Over the first 2 weeks of the course every student will research and recommend stocks to buy. In week 2 session they will have 5 min to present to the group their top 2 stock buys and why they recommend these two stocks. At the end of the session the group will vote and agree on what stocks to purchase. The course leader will execute those purchases. Over the remaining weeks of the course as a group we will evaluate the trades made and make decisions on if we should exit a particular trade and move to another stock. All decisions will be made by the group voting. The course leader will have the final decision on all trades made.

Week 1:

Team name

- At the end of the course we will calculate our winning % and add it to the leaderboard. Future classes will attempt to out perform this class.

Teaching: How to pick your stocks. Things to consider:

- Starting capital. No sense evaluating a \$1,500 stock when we have \$1,000
- Where to get information on stocks
- What type of analysis are you going to do? Technical vs fundamental
- Creating your shortlist
- Preparing to present on your recommendations

Developing our rules



MOMENTUM TAILOR

- What are our rules going to be?
- Where are our profit taking points
- Where are our stop loss points

Preparation for next week.

- What info to share.
- How to summarise the key points
- Order for next week.

Week 2: Extended Session. Each participant will have 5 minutes to recommend 2 stocks they believe the group should purchase. After each student has presented their stock and the group will vote. The next day the course leader will purchase the stocks recommended by the students.

Week 3-9:

Ongoing evaluation of the stocks made.

- Are we going to take profits?
- Hold on?
- Exit losing trades?

Review

- For trades that are successful can we see any patterns as to why they may have been?
- For trades that were not successful, why do we think they lost?

How psychology, beliefs & emotions affect your investing

- Did we notice any times where we felt emotions (positive & negative) throughout the week. Eg. Did we recommend a stock and it's going down and we feel negative emotions (shame, fear, wanting to hide, etc). Did we recommend a stock and it's going up and we feel untouchable, like we can't lose?

Week 10:

The course leader will exit all positions and the class will review the profit made over the time period.

Things to discuss.

- The profit % and the length of time it took to make that profit. Key message: Investing is a marathon not a sprint. Make consistent gains over a long period of time is the best path to success
- Students can share what they learned.
- What to do with the profits? Donate to a cause? Multiple causes?

Please note we intend to make the class interactive and to allow the students to ask questions and dive deeper on any specific aspect of the course content. This may mean that we do not have enough time to cover all the content outlined in this course outline.