

SHARKS & STOCKS

Interviewing Mark Cuban

With this newsletter we wrap up another whirlwind of a quarter for Young Investors Society. During the past months we reached 230 schools, held the Mark Cuban interview in Dallas, hosted the SoCal Golf Event, and hosted the Hong Kong Financial Symposium featuring the CEO of the Hong Kong Stock Exchange. We also strengthened our partnership with Edmodo & the CFA Institute, not to mention planning the marketing, awards, T-Shirts, judges and details for 18 stock pitch competitions to be held throughout April all across the world. Christine, YIS board members and volunteers have pulled off another fantastic

quarter, hats off to all of us!

My highlight this quarter was our weekend in Dallas, where YIS student Cate C. - winner of the YIS Shark Tank contest - held a once-in-a-lifetime interview with billionaire Mark Cuban of ABC's Shark Tank. Lee, Christine, Bryan and I were also there to help make the event a success. Cate conducted a tremendously articulate interview, Mark was incredibly insightful and kind, and all of us came away with the feeling that our organization is truly doing something special.

But that wasn't even the best part. After the interview, we were able to visit North Dallas High School, a low income school in downtown Dallas. We

ONGOING PROJECTS

Dollar-a-Day

Matches: We sponsored 25 kids for up to \$365 each, and plan to sponsor a total of 50 kids during the 2018-2019 school year.

Program

Development: Plan to film 30 lesson videos on April 26-27 in the NetDragon film studios in China.

Adapting Curriculum for the Edmodo platform. Launched the CYIA Certification this year.

IT Support: We are aiming to build an improved YIS Mobile App.



YIS visits North Dallas High School

April 16, 2019

were shocked to learn that about 15% of the students at the schools were homeless, and all are in real financial need. But when we walked into the classroom, led by a remarkable teacher Mr. Gordon Markley, we felt the immense love and respect that his students had for him. We were greeted by a class of smart, engaged kids. Kids that were working hard, preparing for college and filled with hope.

We presented his class with a signed basketball from Mark Cuban and Stockpile gift cards. The magic that we felt in that visit reminded me a lot of that first school visit I made four years ago, visiting Roybal Academy in Los Angeles and getting that touching letter from Edgar that propelled me to start YIS. It was fun to be able to share in another touching moment, this time in Dallas, and accompanied by Cate, Christine and fellow board members. It was a poignant moment that reminded us all why we do what we do.

School Growth

This quarter we added 38 new schools, bringing us to 230 registered schools and just about 2,500 total active students. We added new schools from existing regions such as Utah, New York, California and Malaysia this quarter, as well as added new schools in India, Ghana and South Korea.

It's great to see fantastic year-over-year growth in student participation. It is looking like our stock pitch participants are going to be up more than 3x this year compared to last year! We've had 225 teams registered to participate, and the quality of the reports submitted so far is truly excellent.

1st Annual Hong Kong Financial Symposium

On March 21, YIS held its first Hong Kong Financial Symposium and was honored to host the CEO of the Hong Kong Stock Exchange, Mr. Charles Li. We had over 60 financial professionals in attendance. We shared the story of YIS and heard

from a current YIS student, Zander, about the life-changing impact YIS has had on his life. Charles Li filled the balance of the evening with his

insights on the future of the financial markets in Asia. I want to thank the YIS Asia Advisory Board for putting on a tremendous event!

SoCal Golf Tournament

Speaking of great events this quarter, the West Coast SoCal team put together another fantastic golf event this quarter, with a great turnout of golfers, publicity for our program, and participation of YIS students. Those who attended were able to enjoy YIS students sharing the impact the program has had on their lives, and have a beautiful day out as well. Thanks to all who helped organize this successful event!

Fundraising

This quarter YIS raised \$77,337, an all-time high in quarterly donations. The biggest contribution came from Edmodo, which contributed \$50k. Other donations were from YIS board members, corporate sponsors related to the Hong Kong Symposium, the SoCal Golf Event and the upcoming NYC Gala. It's



YIS HK Financial Symposium with Charles Li, CEO of the Hong Kong Stock Exchange



YIS SoCal Golf Event

always humbling for me to see generous contributions of others, both individually and from corporations. These donations allow us to continue to expand.

Looking forward to Spring

It's exciting to look ahead to what will no doubt be an amazing end of the year for Young Investors Society, as we approach the Regional and Global Stock Pitch Competitions. The kids have been preparing all year for this, and we expect

teams from over 16 US states, and over four countries to participate. The state and regional competitions are being held during April. Then on the evening of May 16th we will hold the Annual Gala at the Marriott Downtown in New York City. The following day, May 17th, we will hold workshops and the first round of Competition at the

Nasdaq and then that evening starting at 6pm we will hold the Global Stock Pitch Finals. A lot of work and planning gets put into each of these events, and we are grateful for Christine and the planning committees for all the

“THANK YOU FOR SUCH AN AWESOME EXPERIENCE THIS LAST COUPLE OF DAYS! I HAD SO MUCH FUN SEEING DALLAS, INTERVIEWING MARK CUBAN AND WATCHING BASKETBALL. I'LL DEFINITELY REMEMBER THIS TRIP FOR THE REST OF MY LIFE. YIS HAS REALLY BEEN LIFE-CHANGING AND I'M SO HAPPY TO BE ABLE TO BE A PART OF IT!”

(CATE C, YIS STUDENT)

time and effort that they have put into planning these events.

Team

We are pleased to welcome **Mark Van Cott** to the Young Investors Society

General Board. Mark is based in Malaysia, had a successful career as a Portfolio Manager at Credit Suisse and has actually helped run a YIS club in Malaysia for the past two years, and thus he knows the YIS curriculum very well and has a lot of great ideas. He has been a great resource, inspired thinker, donor and networker for YIS this year, and

we're thrilled to welcome him as our newest board member.

Conclusion

It was another fantastic quarter for YIS as we look to wrap up our fourth year. These kids continue to inspire me. I believe we have a tremendous program, but it would not be possible to help the YIS kids without the support of people like Mark Cuban, the YIS teachers and our incredible board.

Let's finish the year strong!

- James

YOUNG INVESTOR SNAPSHOT

Name: **Ben S.**

School: **American Fork, HS Utah**
Utah State Stock Pitch Competition Winner, and 2nd Place in the YIS Shark Tank Competition.



MISSION: YOUNG INVESTORS SOCIETY IS DEDICATED TO PREPARING THE NEXT GENERATION OF INVESTORS. OUR MISSION IS TO INSPIRE YOUTH TO BE OUTSTANDING INVESTORS – INVESTORS IN COMPANIES, INVESTORS IN THEIR COMMUNITIES AND INVESTORS IN THEMSELVES.