

WHAT A YEAR!

Faizan's Story

On the 4th of May, Faizan Muhammad was crowned the winner of the 3rd Annual YIS Global Stock Pitch Competition, and he has an incredible story that led him to that point.

Faizan comes from a middle class family in Pakistan. His foray into investing began with a big mistake. A banker scammed him and his family to speculate on oil derivatives and eventually the investment lost everything.

He says "The event was so traumatic for me and my family, that it started me on a quest to learn how to invest correctly. When I found the resources of Young Investors Society online, it was life changing for me". Then over the course of the next six months, Faizan took Young Investors Society to his high school, and he worked diligently going through the lessons, and began to read and track successful investors

(his favorite is David Einhorn from Greenlight Capital).

Faizan wrote a brilliant stock pitch report on Ascena Retail (ASNA US), and won in the international competition against the teams from Hong Kong. He then flew on to New York City to compete in the Global Finals. It was the first time in his life that he travelled outside of Pakistan.

On the 4th of May, the 11 state champion teams presented in NYC at the BNY Building. The quality of all of the presentations was astounding! Faizan must have felt the intensity of the competition, but he delivered his analysis, answered the questions with confidence, and in the end, was announced as the Global



ONGOING PROJECTS

YIS App. Who: Achint and Luutaa team (iOS & Android)

Cost: \$2,000

Dollar-a-Day

Matches: We sponsored 11 kids for up to \$365 each in 2017/2018.

Program

Development:

Launched the CYIA Program this summer, and the test will take place in August.

YIS Advisory Boards:

Are setting up Advisory Boards comprised of 10-15 people in East Coast US, West Coast US and Asia.

IT Support: We are currently soliciting bids for an IT team to support the YIS website and app.

Winner of the Global Stock Pitch Competition, and the winner of \$1,000 cash prize! He said with a smile "Now at least I can pay for my flight home". Afterwards, he wrote me a touching letter, thanking Young Investors Society for all that he has learned, saying it was "the best weekend of his life" and that he has found "his passion and his purpose in life".

You can watch his winning stock pitch [Here](#) on YouTube, it's pretty incredible!

NYC Gala & Activities

This quarter we put on our largest event by far, "Invest in the Future – A Night With Young Investors Society" hosted by

BNY Melon. In total we had more than 120 people attend the event, and raised \$51k from generous corporate sponsorships from IIFL, Jeffries, CLSA, BTG, and EFG Hermes.

Oppenheimer's team of CIO Krishna Memani. Portfolio managers Justin Leverentz and Heidi Heikenfeld were incredible speakers! Broadway star N'Kenge

was fantastic. But I thought the real stars of the night were the YIS kids in attendance, and the testimonials we heard from YIS Co-Presidents Katia and Brenden.

The following day, we had investment workshops for the kids in the morning, and then finally held the Global Stock Pitch Competition that afternoon. Multiple parents came up to me to tell me in tears that their son or daughter's participation in YIS had changed their life. It was all pretty overwhelming.

I want to thank everyone for

all of the time and effort it took to plan and carry out these events. I loved to see the enthusiasm

from the kids and Wall Street community both during and after the event, and I think we'll carry

this momentum into years to come. We're already planning the 2019 Gala and Finals, which I expect will continue to build on this year's success!

If you haven't seen the highlight videos yet, check them out here for the [Gala](#) and the [Stock Pitch Finals](#).

Regional Advisory Boards

As a result of the events this quarter, YIS's recognition has been growing. We have had an outpouring of people reaching out to us: "What you're doing is amazing, how can I get involved?"

In response to these queries, and to support continued growth of YIS, the Executive Board of YIS has resolved to set up Regional Advisory Boards. These boards will be comprised of a group of 10-15 professionals in a region, that will volunteer in a "low commitment, high impact" way. They'll speak once a quarter, and help YIS through their network of

connections, and volunteer as school speakers and competition judges. At the onset, we will be setting up Regional Advisory Boards in 3 Regions: East Coast US, West Coast US, and Asia. These Regional Advisory Boards will allow us to

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(FAIZAN MOHAMED, GLOBAL STOCK PITCH WINNER)



support YIS members in more areas, more fully.

Fundraising

This quarter we raised \$51,000 which makes it by far the biggest quarter of fundraising ever at YIS. At the Gala, I was grateful to see corporates step up to buy tables and invest in our program. I was in awe at some of the personal contributions of YIS Board Members and not just in financial contributions, but also in time, in travel expenses, and in making invitations to contribute to YIS. I'm excited for the connections that we've been creating, one such example was CLSA offering to sponsor an at-risk school initiative in the US for next year.

Looking Forward

It's amazing to step back and reflect upon what a difference three years can make. From my initial conversations with Dave and Jane and a small group of kids meeting in my dining room every week, to now 142 schools offering Young Investors Society to over 1,600 students across 25 states and 4 countries, YIS continues to build momentum.

I believe this next year will be a crucial one, as we test our ability to scale and grow.

Christine now has a year under her belt as COO and is running everything excellently. Our online curriculum and lessons plans are ready to download, and a game-changing app is soon forthcoming! But doubling from 140 to 300 schools will not be an easy task.

Overall, we've learned a lot in these first three years, and experienced tremendous success. But my hope is that we never stop learning, growing and improving our program. Three items that I see a particular need to improve on are **1) the student completion rate %, 2) the student engagement** (both digital and in-classroom), and **3) the Dollar-A-Day participation**. I eagerly await the Board Onsite this weekend, which is always a treasured time to come together and plan for the year ahead. Special thanks to Christine and Lee for spearheading the planning of the event.

Team Changes

We didn't have a lot of team changes this quarter. The setting up of the Advisory Boards is coming together, and those who have accepted already make for an impressive list! We also

announce that **Bryan Jack** will be stepping up to assume the role of Treasurer and become a member of the YIS Executive Board. **Andy Davis** will be stepping down from his role as Treasurer to focus on the West Coast Fundraiser and as Co-Chair of the Fundraising Committee.

I'd personally like to thank Andy for his wit, his wisdom and his invaluable service these past two years on the Executive Board.

So with that I conclude another letter and another year of YIS, and look forward to another wonderful year to come!

- James

YOUNG INVESTOR SNAPSHOT

Name: **The YIS State Winners:**

Christina X, Lauryn W, Camren K, Abdul A, Schildonald J, Zachary S, Colin J, Beau O, Viswanath N, Naren S, Brandon S, Christian M, Faizan M, Alex K, Tasha M, Kyle F, Madison A

From 9 US States, Pakistan and Malaysia



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.