



YOUNG  
INVESTORS  
SOCIETY

## JUNE 2020 QUARTERLY LETTER

YOUNG INVESTORS SOCIETY

### A YEAR THAT WE'LL NEVER FORGET!

#### Thanks to all of you

First and foremost, I would like to wish everybody safety, health and strength through this turbulent time with the spread of COVID-19 around the world. The students, teachers, volunteers, and board members of Young Investors Society have constantly been in my thoughts and prayers over this past quarter.

And who could have imagined the year we had with Young Investors Society! When COVID hit, we had to make a giant pivot to move the competition online, add a Regional competition to the State and Global Competitions, and move the fundraising Gala to a later date and launch a Bridge the Gap fundraising campaign online. Through it all, our commitment was first and foremost to the YIS kids, who had so much of their lives disrupted this year, that we wanted to give them the opportunity to still have the fun and achievement through the YIS programs virtually. Overall, I'm so proud and grateful

to our team and all the volunteers throughout the world, who all pitched in to judge competitions, donate financially, conduct CYIA interviews and deliver a great experience and competition for more than 500 schools that participated across the world.

#### A Virtual(ly) Perfect Competition

I would like to congratulate all of the teams that participated in the largest ever high-school global stock pitch competition. We had hundreds of teams participate from 25 US states and Malaysia, Thailand, and Hong Kong. The winning team this year was **Abhinav P. & Arjun G. from Westlake High School** in California who won with their amazing pitch of Applied Materials, a semiconductor engineering company. Their winning pitch can be viewed [HERE](#) and the entire Global Finals can be viewed [HERE](#). The Global Stock Pitch Competition sponsored by **Investor's Business Daily** and live-streamed on our

### ONGOING PROJECTS

#### Dollar-a-Day

**Matches:** We sponsored 100 kids during the 2019-2020 school year, along with 50 "Start Investing Now" sponsorships.

#### Program

#### Development:

Recently published 23 new lesson videos. Implementing these on our MyYIS portal and Edmodo.

#### NYC Gala: Is

postponed until the Fall (TBD), Keynote speakers: Kate Moore, Chief Equity Strategist at Blackrock and Ted Seides, Host of the Capital Allocators podcast.

YouTube Channel. Guest Speaker, **Paul Smith** (Former CEO & President of the CFA Institute) shared inspiring words as the keynote speaker, and everyone did an such an exceptional job! The quality of the presentations just keeps getting better and better each year.

It also made me reflect on what we can learn from the success of having the competition virtual this year. While we missed the energy and enthusiasm of getting together in person, there are also clear benefits from getting more groups together from around the world, and adding a Regional Competition stage that was possible when held virtually. I would encourage all of us to **think of the lessons that we can learn from this COVID-19 shift to digital**, and how we can best position on our programs for the best of offline and online together.



## Bridge the Gap Campaign

With the cancellation of our Annual Fundraising Gala in NYC, we launched a Bridge the Gap fundraising campaign to raise funds to provide the scholarship matches for the 100 Dollar-A-Day Challenge Student winners. We were looking to raise \$27,000 to meet those scholarships, and we ended up raising \$51,165. The outpouring of gratitude from the student winners was tremendous, and I thank so many of you for your donations as well as spreading the word for the campaign. These are crucial funds that went 100% directly to the students, many of whom are from our 50+ At-Risk Schools.

## Reaching 500 Schools

It's been five years since YIS started, and this month we reached over 500 schools! Actually 512 as of today. It's a tremendous milestone, and one

that we can all be really proud of. 510 high schools is no small number. We serve more high schools than there

are in the entire state of Massachusetts (437) and Utah (429). I hope we all take a minute to reflect on the milestone and the lasting impact we are having on thousands of teens around the world. And now, let's dream how we can reach 5,000 schools!

## Goals for the New Year

While I'm so proud of YIS and the difference that we are making in young lives, the summer break is always a wonderful time for us to reflect on how we can be better and set goals for the years ahead. We'll discuss and strategize at our Annual Onsite as well as at our Regional Advisory Board gatherings, but I want to put forth a couple of goals for us all to think about:

- How do we increase our diversity and At-Risk Initiatives, to really make a difference for kids of all races, genders, and backgrounds?
- What should we learn from the digital transformation during the COVID-19 pandemic, and how do we position YIS for structural growth in a more digital world?
- How do we fund YIS sustainably into the future, increasing Corporate Sponsorships and/or

student dues or premium courses, to take our organization to the next level?

- How do we increase the visibility of YIS and all the good we are doing, so that more kids will be encouraged to participate?

I'm excited to brainstorm with all of you, and I'm grateful for the tremendous team that we have assembled throughout the world to continue to build our remarkable organization.

### Conclusion

We've learned so many things through this unprecedented year. One is that YIS fills a critical need in teens lives, to be a community and refuge for them. Another is that if we are adaptable and flexible as an organization, we can rise to any challenge. And finally, we learn that despite uncertainly and fear around us,

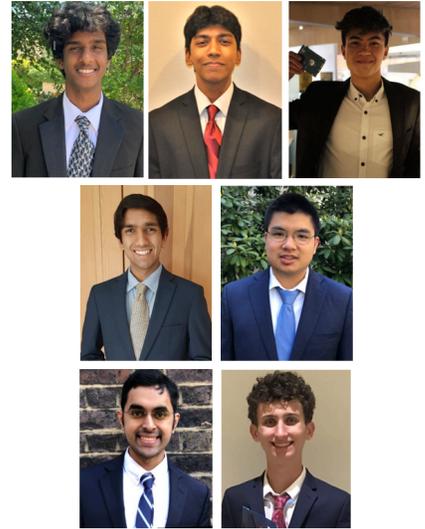
there are so many good people in this world that are there to support each other and give back. I am grateful and touched by each of you. We will emerge from this COVID-19 pandemic stronger and more grateful than ever!

Thanks for another incredible year!

- James

### YOUNG INVESTOR SNAPSHOT

Congratulations to the winners of the 2020 Global Stock Pitch Competition!



1st Place: Arjun G. & Abhinav P. (Westlake High School, CA)

2nd Place: Ethan W. (Basis Scottsdale Charter School, AZ)

3rd Place: Suraj S. & Brant W. (The FLY Initiative, RI)

Honorable Mention: Saurabh K. & John O. (VA)



**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.