

THE GROWTH CONTINUES!

Reaching over 900 Schools

We believe "Investors can change the world!" and this quarter we certainly changed many young lives. With the Investment Symposiums in US, Hong Kong and India, the Shark Tank Competition Interview with Daymond John, awarding 50 more Dollar-a-Day grants, hundreds of teams preparing and submitting their Stock Reports, and now reaching over 900 schools with our biggest quarterly growth ever, we had a huge impact this quarter.

Lauryn Wang, a former YIS student who is now attending UCLA, recently wrote on her LinkedIn page: "YIS provides amazing opportunities to engage with long-term investment



Lauryn Wang, former YIS student

strategies and financial literacy. YIS has truly equipped me with the tools to be a long-term investor and encouraged me to grow as a leader along the way. It was undoubtedly one of the most influential and pivotal experiences in high school!"

It's a great reminder of the impact that YIS can have, that these are not just numbers on a piece of paper.

A Global Community

As of April 7, YIS reached the important milestone of crossing 900 schools! Our goal was actually 800 schools for this year (ending in June), and after adding 110 schools and 105 in 1Q and 2Q, this quarter we added an astounding **161 new schools** and 600 new registered students! At this rate, we may end the year at 1,000 schools, which is pretty mind-blowing.

What has been exciting is to see the stock pitch submissions come in from all over the world from many new areas this year, including new teams from Korea, Singapore, India, Switzerland,

ONGOING PROJECTS

Dollar-a-Day Matches:

We sponsored 100 kids during the 2019-2020 school year, and target to sponsor 100 in 2020-2021, along with 12 "Start Investing Now" sponsorships.

Program Development:

- Continuous refinements to the website and MyYIS portal.
- Creating ESG Module.
- Translating Lessons into Chinese and Spanish.
- Creating Advanced Courses.

Upcoming Events

- State and Regional Stock Pitch Competitions
- 27 May 2021: Global Stock Pitch Competition

and US states of Georgia, Florida, Michigan and others participating for the first time. It's just so fun to see the global community build and expand.

Investment Symposiums

One of the highlights this quarter was successfully hosting three Investment Symposiums in the US, Hong Kong / Asia and India. We had an incredible group of speakers across the board, great participation and Q&A from the students, a great assortment of topics including fintech, stock picking, AI, career building, impact investing and the feedback from the students was positive across the board! Many emailed me after or messaged me during the Zoom, and thanked me for putting together the incredible event.

We would like to thank **Credit Suisse**, who was the sponsor of the Hong Kong and India Symposiums, and helped to provide speakers and mentorship breakout sessions that really helped make the events a success.

Shark Tank Contest

Congratulations to the winners of the YIS Shark Tank Contest:

1st Place: Zach F. (Smithtown High

School East, New York)

2nd Place: Jasper L.

(Renaissance College, Hong Kong)

3rd Place: Claire S. (Canton High School, Michigan)

Best Written: **Gabriel P.** (Cape Coral High School, Florida)

& **Arjun G.** (Westlake High School, California)

The winners had a once-in-a-lifetime chance to meet and interview, Shark Tank star, **Daymond John**. He gave a generous and insightful interview, and the winning student Zach F. led the questions.

You can watch the full interview [here](#).

Stock Pitch Competition

We are entering the most exciting quarter of the year for YIS, which is Stock Pitch Competition season. This year will be a busy one, we will have 24 States / Countries, then 6 Regional Competitions, and then the Global Stock Pitch Competition, which will feature the 6 winning Regional teams

from around the world. **Kate Moore**, Chief Strategist at Blackrock will be the Keynote speaker.

Thanks to all the Regional Advisory Board and General Board members for being such great judges during the Stock Pitch competitions. I hope most of us can attend the **Global Stock Pitch finals on Thursday, May 27**, it should be a great event!

Fundraising

This quarter we raised \$21,700, which included corporate sponsorships for the Global Stock Pitch Competition from **JP Morgan, Citi, and Investors Business Daily**. There are a few more corporates that we are speaking with, so we expect good overall support, and without the operating expense of putting on a gala. All donations to the Stock Pitch Competition this year are going 100% to support the YIS Access Initiative, which focuses on under-served communities.

We will also sponsor 100 students this year in the **Dollar-a-Day matching scholarship**, which will be paid out in June, for which we will run a fundraising campaign in coming months. It's a



Pictured: Daymond John YIS Interview

tremendous way to make a difference on a one-on-one basis to sponsor a kid for \$365, and we'll be looking to raise \$27k to sponsor the 100 winning students this year.

Hong Kong Registration

The HK Advisory Board has been working on an exciting initiative to get YIS non-profit status in Hong Kong, led by HK advisory board member, **Sean Alexander**. This will greatly accelerate the ability to raise funds in Hong Kong and support the growth of schools in Asia.

This quarter, after legal consultations, we found a solution, which was to take over an existing charity, HK Asia Brokers Ltd which was shutting down, where Sean was a board member. This transition has taken



Pictured: Zach F, Winner of the 2021 YIS Shark Tank Contest

place, and YIS is now are the sole board members of it. We will now change the name to Young Investors Society HK Ltd, and because the missions were the same, it is highly likely to be a quick approval. This is a huge milestone and a great achievement by the HK team.

Team

Updates

This quarter, we are excited to welcome a new board member to the General Board of YIS, **Vielcka Mansukhani**. Vielcka is Head of Equity Sales at Bradesco, and earned her MBA at Dartmouth University. She has been a YIS Regional Advisory Board Member, participating on the Access Initiative committee, and a judge of past YIS competitions. We're grateful to have her insights and support to add to the stellar board of YIS.

Conclusion

Times are still not easy, but YIS is moving forward under COVID,

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(LAURYN WANG)

actually things has really been accelerating in recent quarters. I challenge each of us to think about things that we have learned through COVID, and what we can implement going forward to take these lessons with us and make us even stronger. I am really looking

forward to our Global Stock Pitch Competition this year, it's the busy season of YIS but it's also gratifying to see all the hard work from the students pay off and the community come together from all over the world.

Thanks to each of you for your support, and we will see you next quarter when it is possible that we will have surpassed 1,000 schools!

All the best,
James

OUR VISION: INVESTORS CAN CHANGE THE WORLD!

WE BELIEVE THAT WHEN YOUTH ARE EMPOWERED BY FINANCIAL LITERACY, THEY CAN BECOME OUTSTANDING INVESTORS IN COMPANIES, SOCIETIES AND THEMSELVES, THUS ACHIEVING FINANCIAL INDEPENDENCE AND BREAKING THE CYCLE OF GENERATIONAL POVERTY.