



YOUNG  
INVESTORS  
SOCIETY



# Young Investors Society Annual Report 2023-2024

# YIS Mission



Young Investors Society provides quality financial literacy education and programs to students from all backgrounds and socio-economic levels. We aim to teach finance and investing skills that will last a lifetime and empower students to take control of their financial future.

## YIS Principles

YIS 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.

This will be accomplished by pursuing the following principles:

- **Vision:** Young Investors Society seeks to inspire students to think critically for themselves and to evaluate businesses and the world around them with insightful, long-term perspectives.
- **Real-life Experience:** Youth get actual, hands-on experience evaluating companies, building financial models, and buying and selling stocks.
- **Leadership:** Each local chapter of the Young Investor Society is run by the students, recommending and investing in stocks themselves, organizing business and financial professional visits, and mentoring new members.
- **Community:** Young Investors Society members feel that they are a part of something greater than just themselves. They build connections to local businesses, universities and other young investors around the country, as well as the following generation that will take their place once they graduate. Service projects and giving back are important parts of the program each year. Young Investors Society makes special outreach to empower low-income and minority students.
- **Integrity:** Society members are expected to uphold the highest levels of ethical standards in investing, and learn to determine if a target company demonstrates good or poor corporate governance practices.

# Board of Directors



## Executive Board

**James Fletcher, CFA**

*Board President  
Chief Investment Officer  
Ethos Investment Management*

**Patricia Ball**

*Vice President  
Chief Operating Officer  
Ethos Investment Management*

**Jane Winslow**

*Treasurer  
Senior Vice President  
Merrill Lynch (Retired)*

**Steve Barrus**

*Secretary  
Financial Consultant  
Advisory Group for Life*

## Board Members

**John Bowman**

*Executive Vice President  
CAIA Association*

**Bryan Jack**

*Chief Financial Officer  
First Community Bank-Utah*

**Rowe Michels**

*Managing Director, Equity Analyst, Portfolio Manager, and  
Director of Research at Nuveen Investment Trust*

**Vielcka Mansukhani**

*Head of Equity Sales/ LATAM  
Institutional Equity Sales at Bradesco*

**Lee Mackay**

*Partner at Nevers, Palazzo, Packard,  
Wildermuth & Wynner*

**Dave Miles, CFA**

*Research Analyst  
Fidelity Investments*

**Lucy Chuah**

*Investment Analyst  
GQG Partners*

**Claudio Brocado**

*Head of Global Equities  
Nuclo Independent CIO*

**Laura Geritz**

*Chief Executive Officer  
Rondure Global Advisors*

**Andrew Davis**

*Independent Financial Advisor  
WealthSource Partners*

**Mark Van Cott**

*YIS Advisor at International School  
of Kuala Lumpur, Malaysia*

**Christine Tobin**

*Chief Operating Officer  
Young Investors Society*

# Student Advisory Board



## Elected Officers

**President:** Felix P: Diamond Bar HS, CA

**West Coast VP:** Micah S: Newbury Park HS, CA

**East Coast VP:** Devin S: American Heritage, FL

**Mid-West VP:** Mehul S: Chaparral HS, AZ

**Asia VP:** Vikashini S: Venture Academy, India

**International VP:** Luke C: Tonbridge School, UK

**Secretary:** Winnie C: Thomas Wootton HS, MD

**Director of Communications:**

Mahanth K: Middlesex County Academy, NJ

## Members-At-Large

### East Coast

Ashrith K: Denmark High School, GA  
Jordan A: American Heritage, FL  
Ronak P: American Heritage, FL  
Ahan M: Thomas Jefferson High School, VA  
Maanav S: Langley High School, VA  
Faraaz R: Thomas Jefferson High School, VA  
George C: North Carolina School of Science, NC  
Ocean Y: Green Level High School, NC  
Aneesh S: Cox Mill High School, NC  
Aarush J: Cox Mill High School, NC  
Neil G: Cox Mill High School, NC  
Jay S: Ardrey Kell High School, NC  
Tanush P: Cox Mill High School, NC  
Krish K: Academy for Allied Health Sciences, NJ  
Michael Z: Blair Academy, NJ  
Ekam B: Montgomery High School, NJ  
Kushagra S: West Windsor-Plainsboro High School, NJ  
Justin M: Montgomery High School, NJ  
Kerem D: Marlboro High School, NJ  
Teniola T: Winston Churchill High School, MD  
Jocelyn Y: Richard Montgomery High School, MD  
Andrew V: Ethical Culture Fieldston School, NY  
Sean R: Ethical Culture Fieldston School, NY  
Nilay M: North Allegheny Senior High School, PA  
Varshil P: Masuk High School, CT

### West Coast

Christiana S: Mount Everest Academy, CA  
Ryan G: Diamond Bar High School, CA  
Wilson T: Bentley Upper School, CA  
Alice Z: Miramonte High School, CA  
William C: Saratoga High School, CA  
Leonardo N: High School at Moorpark College, CA  
Anish A: Basis Independent Silicon Valley, CA  
Abdullah S: Monte Vista High School, CA  
Ronan M: Mountain View High School, WA

### Mid-West

Ian H: BASIS Chandler, AZ  
Sujay K: BASIS Scottsdale, AZ  
Kendra G: Pikes Peak Early College, CO  
Sreeman C: Cranbrook Schools, MI  
Harsha K: Rock Hill High School, TX  
Carson S: Allen High School, TX  
Sowmya V: Rock Hill High School, TX  
Jacklin W: Memorial High School, TX  
Luke W: Bellaire High School, TX  
Kayla Weng Pulaski Academy AK  
Aaron E: Moundsview High School, MN  
Arehant A: Millard North High School, NE  
Leah W: Walter Payton College Prep, IL

### International

Luke C: Tonbridge School, United Kingdom  
Isabella Z: Marymount School, Colombia  
Ajayveer S: Turner Fenton Secondary School, Canada  
Amir T: NIS of Ph&M, Kazakhstan

Jaime T: Hwachong Institution, Singapore  
Carl L: Discovery College, Hong Kong  
Samrath M: Delhi Public School R.K, India  
Inaya A: Bal Bharati Public School, India

# Letter from YIS Founder & President, James Fletcher, CFA



There is so much to be proud of this year at Young Investors Society! Our program has now grown to 2,390 schools in 80 countries around the world.

I think when we look back at this 9<sup>th</sup> year of YIS in the history of the organization, it'll be remembered as the year we launched the GYIS Summit. We upgraded our flagship event from the Global Stock Pitch Competition to the Global Youth Investment Summit (GYIS) and moved it back to New York City. The new event brings a new mentality: more activities and competitions than just the Stock Pitch Competition, more networking opportunities, more kids invited, and more fun all around! This year, we had a great turnout of over 150 kids attending in person in addition to all the parents and chaperones, over 120 financial professionals as judges and workshop teachers. Special thanks to the YIS team for pulling it off, I specifically want to thank Christine, Maria, and Jayme for their inspiring efforts.

We also made great strides this year at YIS in the revamp of the Dollar-A-Day Challenge, to increase the number of kids that get sponsorships by giving out awards on a monthly basis. The Mid-Year Competition was changed to an Online Knowledge Bowl, which greatly increased student participation. And we started doing quarterly Fireside Chats where we heard from numerous incredible speakers who shared stories and advice. All of these I felt were great improvements to the YIS programs and impact!

We also made tremendous strides this year with regards to corporate partnerships and fundraising. It is exciting to say that this year YIS was sponsored by many incredible organizations including Bloomberg Philanthropies, Goldman Sachs, Grandeur Peak, Capital Group, Bank of America, PIMCO, Blackrock, Fidelity, JP Morgan, Neuberger Berman, MFS, New York Life Investments, American Century, Natixis, Nuveen and AMG among others. The support of these corporations will enable YIS to greatly magnify our impact going forward!

All of this growth is only possible through the support of our amazing board, regional advisory boards, YIS staff, committed YIS teachers, parents and especially the YIS student leaders throughout the world. We couldn't do it without each of you!

As we look forward to our 10<sup>th</sup> Year of Young Investors Society next year, it'll be a both a celebration and a springboard to even greater impact. And as I re-read some of the messages and quotes from the kids about how "life changing" our organization was for them, I remember in the end that it's all about the kids.

Investors truly can change the world, and I'm grateful to each of you!

James Fletcher  
Young Investors Society  
Founder & President

# Letter from YIS Chief Operating Officer, Christine Tobin



This year has been full of amazing progress and continued growth. Young Investors Society has met 100% of the membership and program goals for the year including exceeding our total schools & student goal as well as Dollar-A-Day Challenge and fundraising goals for the year.

We are beginning to see the impact of our growth with the first Global Youth Investment Summit which served over 150 students as well as an increase in the Access Initiative. We can proudly announce that 21% of our total students are served through the Access Initiative. I can proudly say that we are positioned for a future where every high school student has access to FREE, quality, online financial education.

We introduced Fireside Chats where students get to learn personal stories, career advice, and ask questions to a variety of industry professionals. We have had great feedback from the students that they thoroughly enjoyed being able to network and interact with finance professionals.

We expanded our Dollar-A-Day Challenge program to include a personal finance quiz and monthly opportunities for students to apply which led to an increase in participation of 79%. We also doubled the amount of scholarships to students giving scholarship matches to 200 students this year.

We successfully held an online Giving Tuesday Fundraising Campaign and the first Money Skills Teen Conference in Southern California and Utah this year. We continue to secure multi-year corporate sponsorships from Bloomberg Philanthropy and Grandeur Peak to support the Access Initiative. We are amazed at the generosity and support from our YIS Boards and donors as well as corporate sponsors this year for our Invest in the Future Gala which hosted over 200 people and had sponsorships from over 20 investment firms including Bank of America, Goldman Sachs, Fidelity, Capital Group, JP Morgan, BlackRock, Pimco, and many more.

One of the important commitments we are making as we move into the future is the transition and expansion of our website. This year we improved our user experience, expanded data capture, and successfully transition to a U.S. based platform which allows more control over our content and ability to update information quickly.

This past year has been one of continued growth, commitment, and engagement. I am grateful to the YIS Board, Regional Advisory Boards, Committees, and our Executive Leadership Team for all that we have accomplished this year. Together we have established an incredibly strong foundation for progress and growth for many years to come.

Christine Tobin  
Young Investors Society  
Chief Operating Officer

# THE WORK THAT WE DO

## MEMBERSHIP IMPACT



**2,390**

**SCHOOLS**



**12,743**

**STUDENTS**  
*\*est.*



**977**

**TEACHERS**

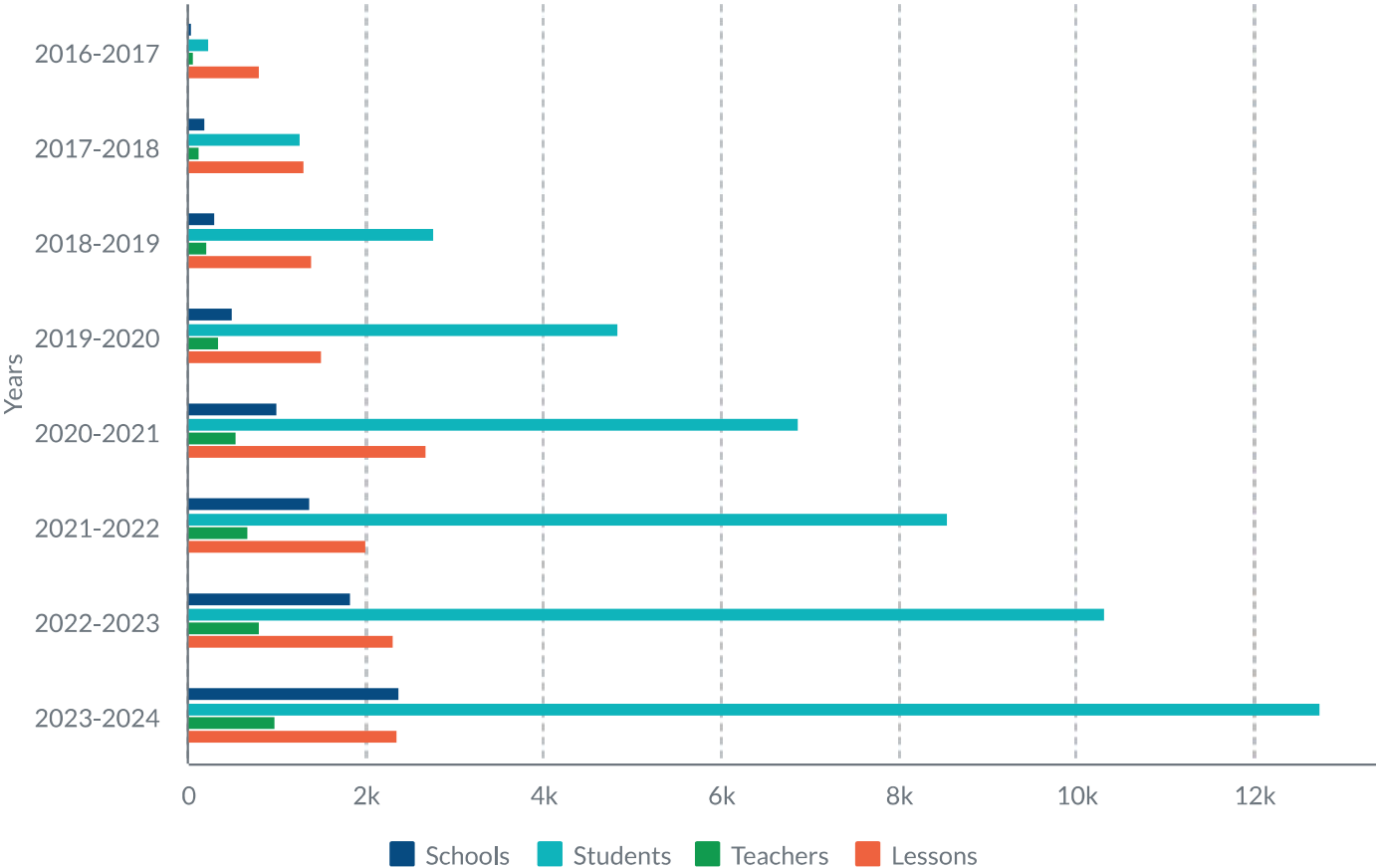


**14,336**

**LESSONS COMPLETED**

*\*Estimated students includes students that use our curriculum in the classroom and students that have attended YIS events.*

Membership Metrics



# YIS SCHOOLS ACROSS THE WORLD



**80 Countries**

**46 U.S. States**

Alabama  
Alaska  
Arizona  
Arkansas  
California  
Colorado  
Connecticut  
Delaware  
Florida  
Georgia  
Hawaii  
Idaho  
Illinois  
Indiana  
Iowa  
Kansas  
Kentucky  
Louisiana  
Maine  
Maryland  
Massachusetts  
Michigan  
Minnesota

Mississippi  
Missouri  
Montana  
Nebraska  
Nevada  
New Hampshire  
New Jersey  
New Mexico  
New York  
North Carolina  
Ohio  
Oregon  
Pennsylvania  
Rhode Island  
South Carolina  
South Dakota  
Tennessee  
Texas  
Utah  
Vermont  
Virginia  
Washington  
Wisconsin

Australia  
Africa  
Bahrain  
Belgium  
Bolivia  
Brazil  
Canada  
China  
Colombia  
Costa Rica  
Croatia  
Czech Republic  
Denmark  
Dominican  
Republic  
Egypt  
El Salvador  
England  
Ecuador  
France  
Germany  
Ghana  
Greece  
Guam  
Guatemala  
Honduras  
Hong Kong SAR  
Hungary  
India  
Indonesia  
Ireland  
Israel  
Italy  
Japan  
Jordan  
Kenya  
Kyrgyzstan  
Kuwait  
Liberia  
Lithuania  
Malaysia  
Mexico  
Morocco  
Nepal  
Netherlands  
New Zealand  
Nigeria  
Norway  
Pakistan  
Peru  
Philippines  
Poland  
Portugal  
Puerto Rico  
Qatar  
Russia  
Rwanda  
Saudi Arabia  
Scotland  
Singapore  
Slovenia  
Somalia  
South Africa  
South Korea  
Spain  
Sri Lanka  
Switzerland  
Swaziland  
Taiwan  
Tajikistan  
Thailand  
Trinidad/Tobago  
Turkey  
UAE  
United Kingdom  
United States  
Uganda  
Uruguay  
Vietnam  
Zambia

# YIS MEMBERSHIP

**Number of Schools: 2390**

**United States: 1786**

**Asia: 315**

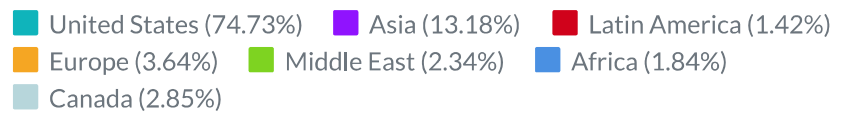
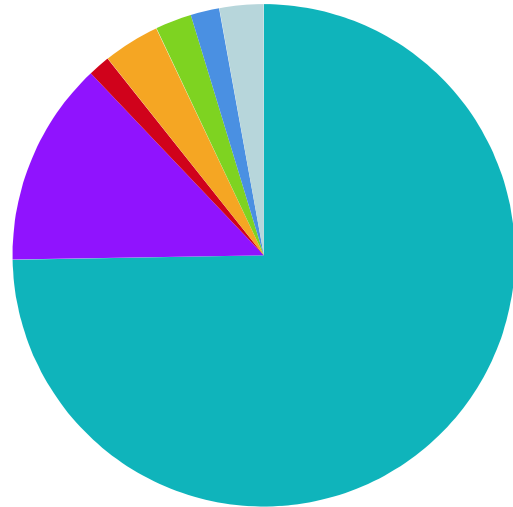
**Europe: 87**

**Canada: 68**

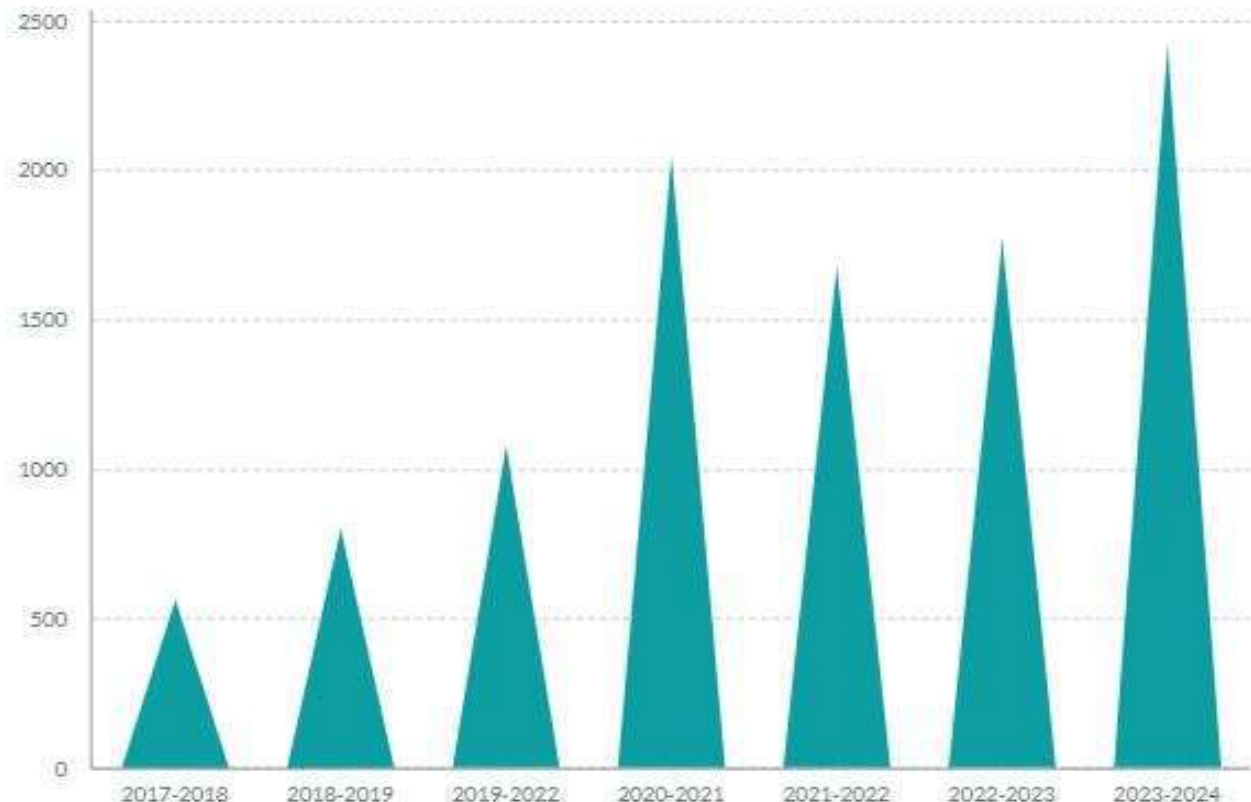
**Middle East: 56**

**Africa: 44**

**Latin America: 34**



**Number of New Students: 2,414**



**\*Average of 1,900 students added each year for the past 3 years**



# YIS ACCESS INITIATIVE

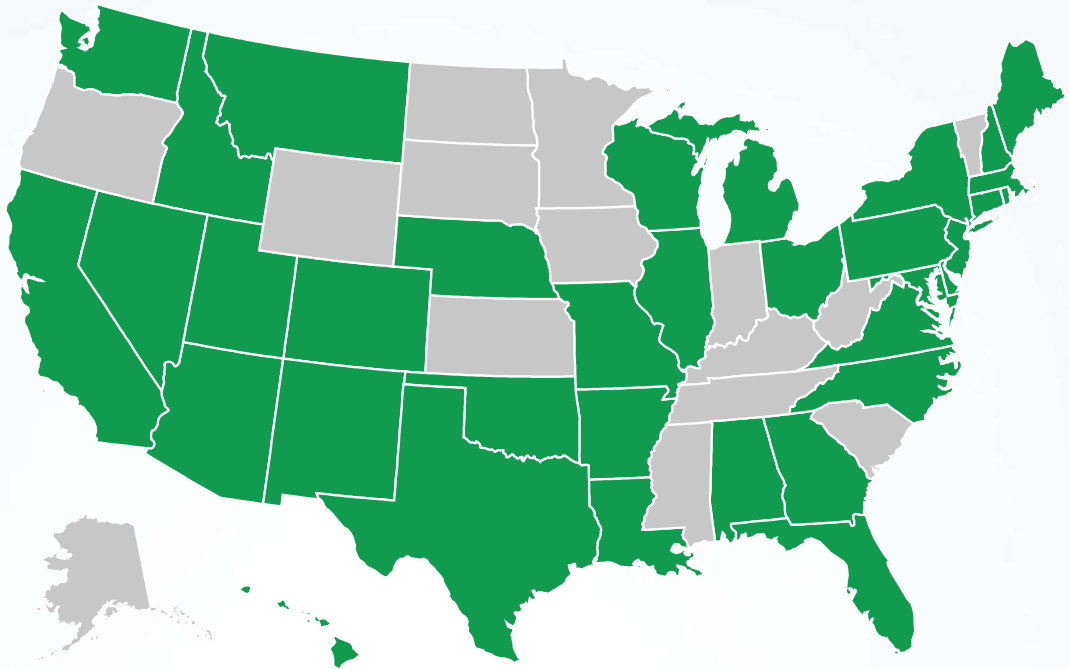
**284+**  
SCHOOLS



**35**  
STATES

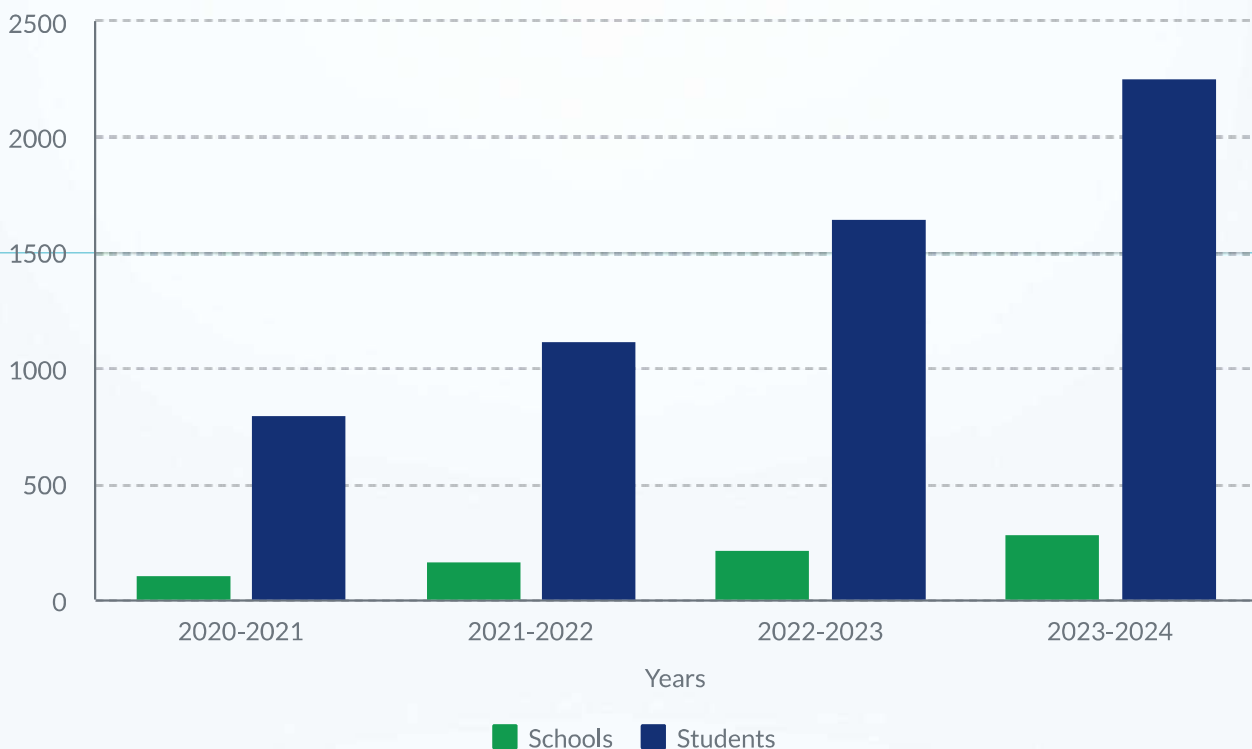


**21%**  
STUDENTS  
SERVED



The YIS Access Initiative serves 2,257 students across 282 schools across 35 states serving approximately 21% of our total YIS students through the Access program. The Access Initiative saw a growth of 29% this year and added an additional 9 Access Partners in underserved areas.

Access Initiative



# THE WORK THAT WE DO

## PROGRAM IMPACT



KNOWLEDGE BOWL

**227**



DOLLAR-A-DAY  
CHALLENGE

**743**



DOLLAR-A-DAY  
SCHOLARSHIPS

**200**



MONEY SKILLZ  
BOOTCAMP

**309**



STOCK PITCH  
COMPETITION

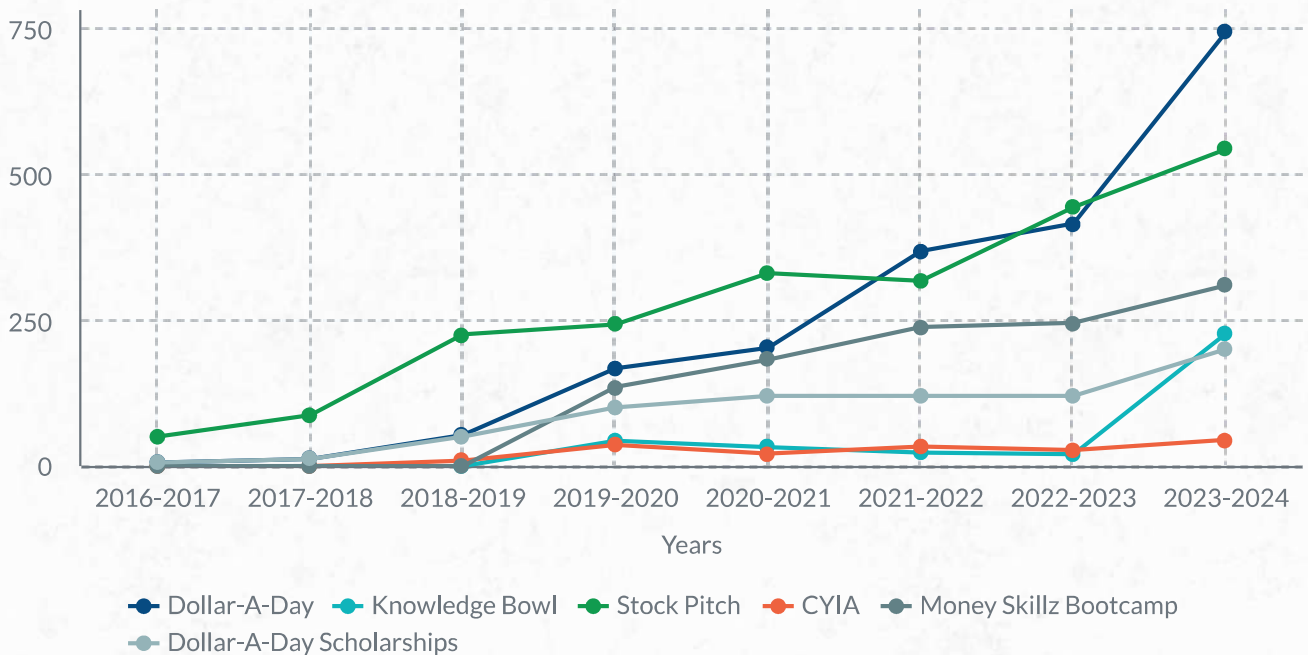
**542**



CYIA  
DESIGNATION

**45**

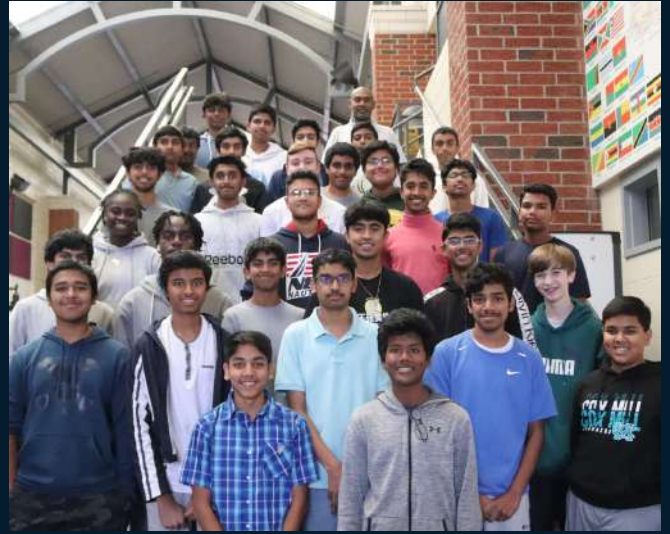
### Program Metrics



# 2023-2024 Program Highlights Community Champions



Tolland High School YIS Club  
Connecticut



Cox Mill High School YIS Club  
North Carolina

Tolland High School YIS Club exceeds donation contributions for the 4th year in a row in the YIS Stock the Shelves Food Drive!

In December 2023, the Tolland High School YIS Club joined forces with the THS Student Council and raised over \$900 dollars, providing over 600 in demand food items for the Cornerstone Food Pantry in Rockville, CT.

The Cox Mill High School YIS Club also participated in raising over 150 needed items totaling over 245 lbs of food for local food banks in Carrabus County, NC.

## YIS Finance Knowledge Bowl

Young Investors Society launched the first Finance Knowledge Bowl in January 2024. Students tested their personal finance and investment knowledge in this virtual Finance Competition. The top 15 finalists were invited to participate in an Analyst For A Day style competition where they answered questions about leading AI companies.



1st Place: Sreeman C: Groves High School, MI  
2nd Place: Veerein P: California High School, CA  
3rd Place: Shane L: Crossroads School, CA



Young Investors Society launched Fireside Chats with industry professionals this year.

Fireside Chats included various speakers from a variety of professions who shared their personal stories, careers, and advice for students interested in the industry.

Students have the opportunity to win prizes and have an interactive experience with a Q & A session with event speakers.



Fall 2023

Jeffrey Garcia: Equity Investment Analyst at Capital Group

Karanja Karubiu: Fundamental Equity Analyst at Goldman Sachs



Spring 2024

Sara Moreno: Managing Director at Jennison Associates

Vielcka Mansukhani: Head of Equity Sales/ Latin America Institutional Equity Sales at Bradesco

# Dollar-A-Day Challenge



The new YIS Dollar-A-Day Challenge was designed to serve an increased amount of Dollar-A-Day participants who are able to apply on a monthly basis. Each participant completed a personal finance quiz for eligibility. The Dollar-A-Day Challenge had 743 students participate and 200 students were selected to receive the Dollar-A-Day Money Match Scholarship for the 2022-2023 school year.

**YOUNG INVESTORS SOCIETY** **DOLLAR-A-DAY CHALLENGE**

“ I plan on investing in Boeing (BA). I believe that the company has a solid future despite issues they have come across recently.”  
—Zoya S.



”



# Bloomberg Connecting Futures Networking Event



We kicked off the 2023-2024 Global Youth Investment Summit with an amazing Connecting Futures Event sponsored by Bloomberg.

Students were invited to tour the Bloomberg headquarters, viewed a Bloomberg terminal demonstration, listened to a panel of industry professionals, and had the chance to network and gain insight into the investment industry by interacting with a variety of finance professionals.

The students were very excited about this event and said that it was a tremendous opportunity for them.



# Global Youth Investment Summit

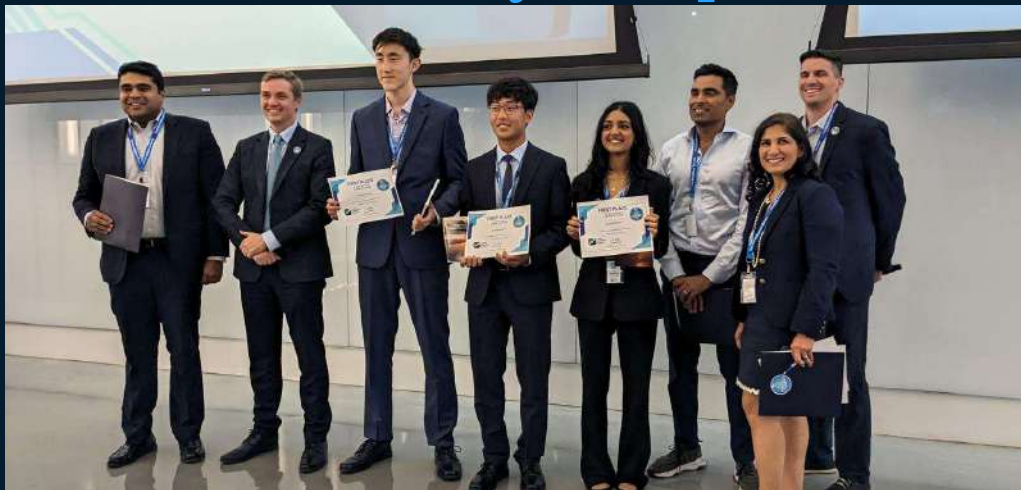


The Global Youth Investment Summit was held at Cornell Tech University on Roosevelt Island in New York. This 2-day event was filled with finance workshops, industry speakers from Microsoft & Goldman Sachs, featured an AI case study competition, personal finance games, and our 2024 Global Stock Pitch Competition.

This event served over 150 students from 21 states and 9 countries including 98 stock pitch teams.

85 professionals from over 40 financial firms participated as stock pitch and case study judges, speakers, and event volunteers.

## YIS Case Study Competition



The case study competition encouraged students to work in small groups to determine a solution that a company in the AI sector might face. Students worked together to present their solution to a panel of finance professionals who judged the presentations.

Case Study Competition Winners  
Carl L: Eleanor Roosevelt High School, NY  
Edward P: Langley High School, VA  
Rasya R: Memorial High School, TX

# 2024 Global Stock Pitch Competition



The 2024 Global Stock Pitch Competition had 543 students participate in the event this year. The top 100 teams were invited to participate in the GYIS event where 98 teams battled to be crowned the 2024 Global Stock Pitch Champion.



## 2024 Global Stock Pitch Winners

1st Place: Zach S: St. John's Preparatory School, MA

2nd Place: Carl L: Eleanor Roosevelt High School, NY

3rd Place: Claire T: Horace Mann School, NY

Honorable Mention: Mahanth K & Isaac C: Middlesex County Academy, NJ

Honorable Mention: Sreeman C: Groves High School, MI & Shane L: Crossroads School, CA

# YIS Access Initiative



The YIS Access Initiative achieved a school growth of 29% this year serving 284 schools and over 2,200 students across 35 states. The YIS Access Initiative currently serves 21% of total YIS students via afterschool program partners, school clubs, and individuals. YIS successfully added 9 new Access Initiative partners this year.



# Money & Investing Day Utah



Young Investors Society hosted the Money Skillz Teen Conference in Southern California and the Money & Investing Day in Utah this year. Students rotated through various finance and investing workshops followed by a networking session with industry professionals from various local firms including Pelion, Grandeur Peak, Fidelity, and FMB Wealth Management.

## Money Skillz Teen Conference California



# Invest in the Future Dinner & Fundraising Gala



The YIS Invest in the Future Dinner & Fundraising Gala was held at the beautiful New York University Club in NYC. Over 200 people were in attendance with over 20 sponsored tables from leaders in the financial industry including, Bloomberg, Goldman Sachs, Bank of America, BlackRock, JP Morgan, Capital Group and many more.



The Gala featured our Honoree, Anna Snider, Head of Investment Selection at Bank of America and Keynote Speaker, Steve Barry, CIO and Head of Fundamental Equity at Goldman Sachs Asset Management.



# 2023-2024 Corporate Sponsors & Partners

We are honored to have the following sponsors and partners support Young Investors Society during the 2023-2024 school year. Due to the generosity of our sponsors, we were able to continue to provide curriculum and programs to over 10,000 students across 46 states and 80 countries.

**Bloomberg**



**BANK OF AMERICA**

**Goldman Sachs**

**PIMCO**



**GRANDEUR PEAK ADVISORS**

**AMG**

**BlackRock**



**J.P.Morgan**  
ASSET MANAGEMENT



**CAPITAL GROUP** | **AMERICAN FUNDS**



**NATIXIS**  
INVESTMENT MANAGERS

**NEUBERGER BERMAN**

**FIRST EAGLE**  
INVESTMENT MANAGEMENT



**LORD ABBETT**



**American Century**  
Investments®

**nuveen**  
A TIAA Company

**Allspring**



**COLUMBIA**  
**THREADNEEDLE**  
INVESTMENTS®

**HARTFORDFUNDS**  
Our benchmark is the investor.™

**DWS**

**MFS**  
100 years



**INVESTMENTS**

# Thank You For Your Support

## Student Testimonials

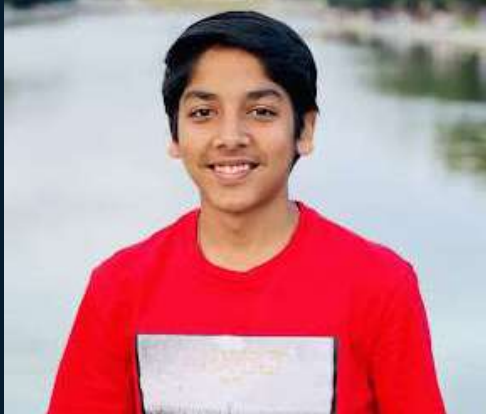
"Young Investors Society has been one of the most influential organizations I have been a part of in my life. Joining it is truly an investment in yourself, one that pays great rewards. Through all the knowledge and opportunities they offer, I have been able to learn everything about finance and get the chance to apply it."

Neil G.  
Cox Mill High School, NC



"I'm a passionate Finance learner and sharing this excitement and knowledge with others is my main life goal, which is perfectly aligned with Young Investors Society. I've learned and experienced many new, interesting things that would be hard to replicate if it weren't for YIS."

Ronan M.  
605 Academy, SD



"Joining YIS is the best decision I've ever made - not only did I become more financially literate, but I also met an amazing community of people who all strive to make the world a better place. I will always remember and treasure the opportunities that YIS has given me."

Jocelyn Y.  
Montgomery High School, MD



"YIS has been a superlative resource and community to engage with throughout my high school journey. Whether it was refining my research skills with the Global Stock Pitch Competition, or accumulating applicable knowledge from the masterclasses, YIS has proven itself to have a universally positive impact on anyone who gives their attention to it."

Shlok G.  
Northwood High School, CA



"We've experienced the privilege of being part of YIS, and I believe it's our duty to extend the empowerment of financial education to others who may not have had the same access. The opportunities in YIS are truly not to be missed!"

Jacklin W.  
Memorial High School, TX



"YIS is a family of passionate people, all of whom are driven to succeed and be financially literate. I enjoy being part of this unique community and working and competing with students across the globe."

Mahanth K.  
Middlesex County Academy, NJ



### Young Investors Society

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