



MAR 2025 QUARTERLY LETTER

YOUNG INVESTORS SOCIETY

10 YEARS & THE BIGGEST YET

Getting Ready to Host

~300 Students at GYIS

We were excited this quarter to see 644 Student Participants (405 Stock Pitch Teams) in the YIS Stock Pitch Competition. This year the GYIS will be the biggest yet, double the size of last year with 300 kids attending in-person. Incredible! Year after year, we continue to get positive feedback about the Stock Pitch Competition, and what a life changing experience the GYIS has become. Here are just a few quotes from students recently:



"YIS has so many wonderful opportunities for students but my favorite would have to be the YIS Global Stock Pitch Summit. Being able to hear from so many industry professionals and network with them was a truly immersive experience."

Meiling R.

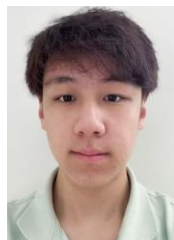
American Heritage School,
Florida



"My favorite program is the Stock Pitch Competition as it helped me expand my research and analytical skills."

Anjali P.

Garnet Valley High School,
Pennsylvania



"I particularly enjoyed the Stock Pitch Competition, which challenged us to conduct in-depth financial analysis and make data-driven investment decisions."

Jiarui (Jerry) W.

Cresan Lutheran High School,
California

We are looking forward to the 10th Year Anniversary Celebration, and hope to see many of you there in NYC!

UPCOMING EVENTS

- Global Youth Investment Summit (May 29th and 30th in NYC) at Cornell Tech Campus.
- The NYC Gala is planned to be held the evening of May 29th at the University Club.
- The YIS General Board Onsite will be held Saturday, May 31st in NYC.

School Growth

This quarter, we reached 2,870 schools and added 233 new schools, and 1,170 new students. We added 11 new Access Schools. We are working to monitor engagement more, and we were able to see that 1,381 Lessons were completed this quarter, as students prepared their stock pitch reports.

Another way that we can see engagement picking up is through the Dollar-a-Day Money Matching Competition, where we saw 413 students participate this quarter, and we were able to give sponsorships to 117 students.

Additionally, there were 47 new teachers added this quarter, which was also increasing from last year.

Firesides & Knowledge Bowl

The Finals of the Knowledge Bowl had a record turnout, with 344 students participating in the Online Kahoot Quiz in the First Round, and then the Top 21 students participating in the knowledge Bowl Finals in an "Analyst for a Day" competition. A huge congratulations to **Athithya G.** from Hillsborough High School, NJ for winning the competition.

We also continued to have a fantastic lineup for Fireside Chats

this year, this quarter delivered again with two amazing speakers, **Priya Prasad Bowe** – Head of Sustainability at Oaktree Capital Management and **Shayne Arcilla**, Senior Analyst (VP) – Natural Resource Equities at Cohen & Steers.

Preparing for the GYIS and Gala

The GYIS this year is shaping up to be the biggest and best ever, with 300 students expected to be participating, along with an amazing group of judges, speakers and volunteers. We are excited to offer a Venture Capital

/ Start Up Workshop and Competition for the first time, to go along with the Stock Pitch Competition and the Case Study Competition. We will have an opening social at Bloomberg and JP Morgan the first evening.

The Gala is also shaping up to be our best ever! We are excited to have Anastasia Titarchuk, CIO of New York State Common Fund, the largest in New York managing \$260 billion as the keynote speaker. We will also have an all-star investment panel led by **Anna Snider**, Head of Investment Selection at Bank of America,

Join us in celebrating

Honoree and Keynote Speaker



Anastasia Titarchuk,
CIO, New York State
Common Retirement Fund

Featuring All-Star Investors



Stephanie Link,
PM, Hightower Advisors



Anna Snider,
Head of Investment Selection,
Bank of America



Matthew McLennan,
PM, First Eagle
Investments



Cathie Wood,
CIO, ARK Invest

along with **Cathy Wood**, CIO of Ark Invest, **Matthew McLennan**, Portfolio Manager at First Eagle Investments and **Stephanie Link**, Portfolio Manager at Hightower Advisors. This will be an unforgettable evening to celebrate 10 Year of Impact of YIS.

Fundraising

YIS has raised \$249,650 this year so far compared to \$ 181,504 last year at this time, coming from large individual donations as well as meaningful corporate donations from Grandeur Peak, Bloomberg, JP Morgan, PIMCO and others. We are so grateful for all those individuals and corporate sponsors, we couldn't do it without you!



EDISON ACADEMY MAGNET SCHOOL,
NEW JERSEY

We still have additional tables to sell for the upcoming Gala, so if you know of an organization that would want to sponsor and attend, please let us know and help us make the connection.

Conclusion

We're so excited to commemorate the 10th year of YIS. With the backing of amazing partners such as Bloomberg, JP Morgan, Goldman Sachs and Grandeur Peak, as well as incredible speakers at the Gala, and more than doubling the amount of kids that will be able to attend the GYIS in NYC, it is shaping to be an unforgettable year.

It's fun to think back on the past 10 years of YIS, through all of the growth and all of the

milestones, and most importantly the thousands of lives that have been changed. It makes me excited to see what the next 10 years will bring!

Thanks for everything!

James

YOUNG INVESTOR SNAPSHOT

Alexander P.

Edison Academy Magnet School,
New Jersey

"My experience with the YIS program has broadened my understanding of finance and encouraged me to learn more about economics. After taking the financial literacy lessons, I was able to develop new skills for the future and apply them when making financial decisions. Looking forward, I cannot wait to take these lessons and compete in this year's YIS Global Stock Pitch Competition!"



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.