



## SEPT 2025 QUARTERLY LETTER

YOUNG INVESTORS SOCIETY

### THE NEXT DECADE OF YIS BEGINS

#### An Exciting Milestone

It is with great pleasure, that we welcome **Will Landers** joining YIS as the Executive Director. Will has over 30 years of experience in finance, spanning investment management, equity research, and investment banking. Most recently, he served as Managing Partner at BTG Pactual. He also spent 17 years at BlackRock, where his team managed up to \$12 billion in Latin American assets. Will is also active in business leadership and nonprofit work, serving as President and Board Chair of the Brazilian American Chamber of Commerce,

It is a milestone at Young Investors Society that we could attract the caliber of a leader



such as Will to join and help lead the mission and the growth of YIS for the next decade.

Please join us in welcoming Will to the YIS family!

#### WeBull Partnership

We are also happy to announce a new exciting partnership with WeBull Financial. WeBull is the 2<sup>nd</sup> largest Online Brokerage App in the US, with 23 million registered users, and operates in 14 countries. We entered into a partnership with them, that they will contribute sponsorship money and become the Official Online Brokerage for YIS, and we can run the Dollar-a-Day payments and competitions through WeBull's platform. This has the potential to significantly increase the reach of YIS, as WeBull will be able to create a custom landing page and IT platform for YIS, and be able to market to the 23M users to get their kids learning about finance through YIS. WeBull plans to offer custodial accounts for teens later this year, and all stock trading is free with no monthly fees.

### UPCOMING EVENTS

- YIS Knowledge Bowl Competition (Jan. 2025)
- YIS Fireside Chats Ongoing
- Global Youth Investment Summit (May 28<sup>th</sup> and 29<sup>th</sup> in NYC) at Cornell Tech Campus.
- The NYC Gala is planned to be held the evening of May 28<sup>th</sup> at the University Club.

September 30, 2025

## School Growth

This quarter, we added 165 new schools, 1,061 new registered students to reach **3,178 schools** and 15,484 cumulative total registered students. We also have more data on active schools and retention, with 1,246 lessons completed this quarter, and **4,402 active students** on the platform this quarter, of which 3,341 were from past years. We expect this number will continue to grow as the year progresses, as we have been averaging about 3k new students per year. This new tracking was enabled by our latest IT push (funded by **Dave Miles**, thank you!) which established a Metabase that accesses a new website database. This is a tremendous step forward, and will allow us to better monitor and engage schools on an ongoing basis.

## Fireside Chats

We are excited to continue with the popular Fireside Chat series this year, and the first speakers were excellent this quarter! We hosted **Arpan Shah**, Managing Director at Goldman Sachs Asset Management and **Christina Malbon**, Associate Portfolio Manager at Patient Capital Management. They shared great investment and career advice, and had great student engagement.

We are also looking forward to another Broadcast on October 29, for a **YIS Teacher Back to School Night**, to help equip both new and returning teachers the tools and strategies to run successful YIS clubs. It will be led by **Wei Wang**, YIS Advisor at QD Learning, **Karsten Walker**, YIS Board Member & GYIS Co-Chair, and **Omar Naranjo** YIS Advisor at Timpview HS, Utah.

## Student Leaders

Fall is an exciting time at YIS, because we announce our students leaders for the year. We are thrilled at the growing group of YIS Student Advisory Board members each year. Here are the students leaders this year:

**Co-President: Isaac C: Edison Academy Magnet School, New Jersey**  
**Co-President: Alisa C: Valencia High School, California**  
**West Coast Vice President: Arjun**

**R: Lake Oswego High School, Oregon**

**East Coast Vice President: Neil G: Cox Mill High School, North Carolina**

**Mid-West Vice President: Temi O: Allen High School, Texas**

**International Vice President: Luke C: Tonbridge School, United Kingdom**

**Secretary: Emme H: Diamond Bar High School, California**

**Student Director of**

**Communications: Jacklin W: Memorial High School, Texas**

**Social Media Team Leader:**

**Alexander P: Edison Academy Magnet School, New Jersey**

We are also excited to welcome over 100 student members of the Global Youth Board Members at large. It's a tremendous group of young leaders!



## YIS Investment Fund

Another positive update this quarter, was the official launch of the YIS Investment Fund, seeded with \$100,000, donated by Claudio Brocado, and will be known as the **Serxio Infinite Fund (SIF)**, modelled after Claudio's Infinite Fund that he has managed for the past 5 years, and has performed well. Rowe Michels will also act as the Investment Committee Chair.

This exciting thing is that this gives the opportunity for internship opportunities to YIS as student analysts, writing research on companies for the fund. This year, we expect to select 4-5 YIS All-Stars to be the pilot group of analysts. Over time, this number will grow, and I think will be a key draw for the GYIS winners as well as the CYIA Certification earners to be eligible for this incredible work experience opportunity.

## New Board Members



YIS Club at Diamond Bar H.S. California

With the continued growth of YIS, we are pleased to welcome new General Board members as we begin the new year. They will add much to our experience, connections and growth.

- **Susan Kempler**, Former Managing Director and Portfolio Manager at Nuveen where she managed a \$13B fund.
- **Bryan Jack**, Chief Financial Officer at First Community Bank of Utah
- **Karsten Walker**, Former H.S. Teacher of Business and Investment Advisor

Thank you to the YIS team for all of their contributions!

We couldn't do this without you!

## Conclusion

What a great year we are on track to have! We start the year with a major partnership and infusion of capital, the hiring of an experienced Executive Director, and the start of what we think is already the largest student high school investment fund in the US.

I envision a day when we cross 10k schools, have 100k kids per year participating around the

world, with thousands attending the GYIS and receiving Dollar-a-Day sponsorships each year. I think we have the right people, programs and mission to achieve these lofty goals over the next 10 years.

I'm so grateful to each of you!  
James

## YOUNG INVESTOR SNAPSHOT

**Samyukta B.** The Bombay International School, India

"I'm currently in my junior year at NYU Stern studying finance and real estate. This summer, I interned at New York University's endowment, where I worked extensively on their real estate portfolio and prepared an investment case on digital infrastructure. YIS has been so instrumental to my journey. Thank you for everything YIS!"



## 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.