



# Unique Ways Universities are Maximizing Their StockTrak License

## Virtual Investing & Portfolio Management

Stocks, Bonds, Mutual Funds, Options, Futures, Forex & Crypto

## Personal Finance Simulation

Budgeting, Banking, Credit, Debt, Insurance, Taxes & Investing



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## Objectives & Agenda

### OBJECTIVES

-  Explain the functionality of StockTrak's simulations
-  Review the **newest** features
-  Share **best practices** to get the most benefit for the maximum number of students at your university

### AGENDA

- 1 StockTrak Overview:** Who We Are
- 2 Our Stock Market Simulation:** For your Investments, Portfolio Management, Derivatives, Macro Economics, & Financial Statement Analysis classes
- 3 Our Personal Finance Simulation:** For your Personal Finance classes (and really for all your students at your school)
- 4 Best Practicing & Success Stories:** How professors are implementing it in their classes



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## Virtual Investing & Portfolio Management Simulation

### AN EDUCATIONAL SIMULATION THAT IS MUCH MORE THAN JUST A STOCK MARKET GAME

-  Professors **customize** the virtual trading rules to match class objectives
-  Professors create “**Assignments**” to help students fully explore the functionality and the embedded tutorials
-  Essentially **self-grading** as Assignments automatically track students’ activities and performance
-  Features stocks, ETFs, mutual funds, bonds, options, futures, futures options, forex, spot commodities & cryptos
-  Most of U.S. markets are **real-time bid/ask prices**. European and Asian markets may be delayed or end of day pricing
-  Students can be required to write “**trade notes**” with each trade that become their **trade diary**
-  Accounts ranking include percentage return, **Sharpe Ratio, Jensen’s Alpha and Treynor Ratio**
-  Other tools include **pre-populated portfolio**, weekly cash deposits/withdrawals, buy & hold accounts
-  Real-time Detailed Admin Reporting Tools



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## Mastering the Markets: The Power of StockTrak Simulations

**FINANCIAL THEORY**

- Lectures
- Textbooks
- Academic
- Academic Research

**REAL-WORLD APPLICATION**

**Advanced Simulation Features**

- 1. Real-Time Global Market Access**  
Users trade stocks, options, futures, and forex across 50 global exchanges using live data.
- 2. Fully Branded & White-Label Solutions**  
Platforms are customizable with university/corporate logos, colors, and specific trading rules to meet objectives.
- 3. Integrated Admin & Analytics**  
Administrators monitor performance via real-time dashboards, diversification reports, and detailed student activity tracking.

**Proven Global Impact**

- 80%** Trusted by 80% of Top US Business Schools  
Over 1 million users annually across 1,000+ universities and 50 different countries.
- 98%** User Confidence Rating  
Nearly all users reported increased confidence in navigating financial markets after using the platform.
- 99%** Perceived Value  
Users who found value in the programs.
- 99%** Users who recommend the programs.

**Versatile Use Cases**

- Campus-wide challenges
- Student-managed investment funds (SMIFs)
- Corporate customer acquisition programs

### University Case Studies: Using StockTrak Site License and Branded Sites to Drive Engagement

StockTrak’s platform gives universities the flexibility to tailor the learning experience, increase student participation, and introduce personal finance and financial markets to ALL students, not just the business majors. Several institutions have used the platform in creative ways to meet teaching, recruitment, and outreach goals. The examples below highlight how different universities have put branded sites to work.

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## New Feature

# Money Management/Budget Game for Personal Finance Classes

*Students click die and move through month and get bills, paychecks, unexpected events and weekend activities*

- Students have a job, live on their own, and have 7 bills to pay each month.
- They establish a monthly budget & as they roll thru the month, random events happen to wreck their budget.
- Students play 12 virtual months, trying to optimize budgeting, savings, credit score & quality of life.

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## New Feature

# Professor Admin Menu to Create/Manage Assignments/Lessons

*Assignment Creation*

REQUIRE	ACTION	TIME DURATION	ALLOW RETEST?
<input type="checkbox"/>	Unit Introduction - Stock Market Basics	10 mins	<input type="checkbox"/>
<input type="checkbox"/>	What is a Stock?	7 mins	<input type="checkbox"/>
<input type="checkbox"/>	What is a Ticker Symbol?	3 mins	<input type="checkbox"/>
<input type="checkbox"/>	Getting and Understanding Stock Quotes	10 mins	<input type="checkbox"/>
<input type="checkbox"/>	Why Invest in Stocks?	14 mins	<input type="checkbox"/>
<input type="checkbox"/>	Building a Diversified Portfolio	11 mins	<input type="checkbox"/>
<input type="checkbox"/>	Getting Trading Ideas	16 mins	<input type="checkbox"/>
<input type="checkbox"/>	Watch Video - Managing Your Portfolio	15 mins	<input type="checkbox"/>
<input type="checkbox"/>	Watch Video - Trading Stocks	4 mins	<input type="checkbox"/>
<input type="checkbox"/>	Watch Video - Using Limit Buy Orders	3 mins	<input type="checkbox"/>
<input type="checkbox"/>	Watch Video - Using Limit Sell Orders	3 mins	<input type="checkbox"/>
<input type="checkbox"/>	Watch Video - Using Stop Orders	2 mins	<input type="checkbox"/>
<input type="checkbox"/>	Watch Video - Using Order Terms	2 mins	<input type="checkbox"/>

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## New Feature

# Professor Reporting – Rankings, Holdings, Trades, Assignments

Dashboard ▾ Portfolio Simulation ▾ Investing Research ▾ Learning ▾ Admin ▾ Reports ▾

**SESSION**

- Summary Report
- Registration File

**CUSTOM REPORTS**

- Create Custom Report
- View Custom Reports

**PORTFOLIO SIMULATION**

- Ranking Report
- User Summary Report
- Activity Report
- Diversification Report
- Top Traded Securities
- Full Session Portfolio Exports

**ASSIGNMENTS**

- Assignment Student Progress Report
- Assignment Class Progress Reports
- Manage Assignments

**Admin Message**

MESSAGE: This is a test

**User Rankings**

RANK	USERNAME	NAME	PORTFOLIO VALUE	ACTIONS
1	lma1998	lma1998 Lisa	100,100,000.00	
2	fconway	fconway Frank	1,539,490.00	
3	ProfessorMobasher1	ProfessorMobasher Amir	1,504,604.06	
4	yzhang	yzhang Yilei	1,027,322.21	
5	Wendyku	Wendyku Wendy	1,023,976.30	

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**Top Traded Securities**

**Word of the Day**

**Fundamental Analysis**

A type of investment research that focuses on analyzing a business's financial statements and operations to determine if it is worth buying. This is sometimes considered "researching what to buy," as opposed to trying to time when exactly to buy or sell.

**Upload Document**

**Administration**

- Register New Class
- Edit Existing Class
- Manage Assignments
- View Reports
- Professor Resources

**Getting Started**

- How To Set Up A Class
- How To Use Assignments
- Using Reports
- Class Project Ideas
- Professor FAQ

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## New Feature

# Student Dashboard with Assignment, Portfolio & AI Wizard

**Trading Portfolio** 76 Days Left

Open Positions    Closed Positions    Portfolio Summary    Transaction History    Rules

PORTFOLIO VALUE: \$1,000,036.37    PORTFOLIO RETURN: 0.4%    CASH BALANCE: \$1,000,036.37    BUYING POWER: \$2,000,070.74    MY RANKING: 07 / 2

TRADES MADE: 0 / 400

**Open Positions**

There are presently no equities in your portfolio. Consider some of these trending stocks...

<b>PEPSICO</b> PEP \$74.98 \$74.98 ▼ -0.55%	<b>AT&amp;T</b> T \$11.36 \$11.36 ▼ -0.37%	<b>DIS</b> \$13.44 \$13.44 ▼ -0.13%
<b>AMERICAN LIG</b> AEO \$20.19 \$20.19 ▼ -0.56%	<b>3M</b> MMM \$134.20 \$134.20 ▼ -0.48%	<b>SBUX</b> \$96.83 \$96.83 ▼ -0.79%

Use our the Wealth Wizard to see how ChatGPT can help...

**Watchlist**

SYMBOL	EXCHANGE	LAST PRICE	CHANGE (B)	VOLUME
MSFT	US	438.69	7.88	21,706,589
TSLA	US	243.92	16.72	102,694,676

**Market Snapshot**

Market Summary    ↑ Top Gainers    ↓ Top Losers

SYMBOL	DESCRIPTION	CHANGE (%)
SBPS00	500 Active Trust - SPOB 5AP 500 ETF Trust	1.71%

**New AI Wealth Wizard can will ask student a series of questions and then suggest a detailed question to ask ChatGPT; if professor enabled AI Wizard.**

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## Unique Functionality Adds Real-life Scenarios

### PREPOPULATED PORTFOLIOS

Have the students start off with a portfolio of stocks—but each is a financial advisor that must now manage the portfolio for the client.

### AI WEALTH WIZARD

Asks students how much money they want to invest, in how many stocks, in how many industries, with what dividend yield, which industries to overweight—then creates a question to copy into their favorite AI tool; ALSO analyzes holding.

### ASSIGNMENTS

Require all the trade types that platform offers.

### WEEKLY CASH DEPOSITS

Start with a low cash balance, but every week a \$X,000 deposit is made—forces students to invest weekly and learn dollar cost averaging. Or force students to rebalance account weekly.

### TRADE NOTES

Require students to write an explanation with each trade. At end of semester have them turn in this trade diary and explain if what they thought actually occurred.

### OTHERS

Crypto, Forex, Sharpe Ratio Rankings, Portfolio Shocks



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## Beyond the Investment Class Opportunities

### 2024 Distinguished Educator Award:

*Paul Cox, University of Bath*

Scenario: Students are hedge fund managers for a client with a \$100 million pre-populated portfolio that they must adjust to client's needs & market conditions.

#### Results:

- **Doubled class size**
- **More finance majors**
- **Student jobs:** London banks asking to interview top students!



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## More Unique Features – Campus Wide Investing Challenges

### University of Texas – Dallas (UTD): Campus-Wide Investing Challenge (students switch to Business/Finance majors)

#### Objective

Encourage broad participation **across entire campus** and introduce the stock market/investing to **ALL** students from **ALL** academic backgrounds.

#### Approach

UTD launched an annual “UTD Investing Challenge” through a dedicated branded site. The competition used simplified trading rules so that students from engineering, arts, humanities, and business could participate comfortably, regardless of prior financial knowledge. Promotion was carried out across multiple faculties.

#### Result

The initiative drew **strong participation from students outside the finance program**. It helped spark wider conversations about investing across campus while positioning the finance department as a valuable resource for students in other majors.



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## More Unique Features – Campus Wide Financial Literacy Program



### Campus Wide Financial Literacy Program

The **ONE** skill that **ALL** students at your university should have.

Financial Literacy should be taught to **ALL** college students, not just those students taking a Personal Finance class.

With our turnkey Campus Wide Financial Literacy Site License or Branded Site, your university can make sure **EVERY** student graduates with basic financial literacy skills covering everything from banking, savings, credit and debt to insurance, taxes, investing and retirement.

**Financial Literacy is for EVERYONE!**

[Request More Info](#)

[Download our Financial Literacy Brochure](#)

- All students have access to personal budgeting game, \$10,000 in a virtual brokerage account, and financial literacy lessons.
- Student accounts have access until graduation



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## University of California, Santa Cruz Financial Literacy Program

**COWL Program**

**Client since 2024:** Large scale asynchronous class

**Students served:** 1,700+ annually; single lecture with ~800 students, some sessions up to 970

**Course focus:** Practical investing and personal finance for large online classes

**StockTrak's role:**

- Scalable platform for investment simulations for thousands of students
- Provides instructors with participation and outcome tracking tools
- Includes personal finance and budgeting simulations for hands-on learning

**Outcome:** Students gain practical investing experience and stronger personal finance skills in a scalable online format

The screenshot shows the UC Santa Cruz course page for COWL 52. The page title is "COWL 52 Personal Finance and Investing". The description states: "Overview of the financial responsibilities that young adults take on after college. Topics include: taxes, budgeting, student loans, credit, and investing in the stock market. Ubiquitous terms, such as 401(k), are defined, and financial principles are used to develop a framework for personal financial decision-making." The credits are 5, and it is offered in Winter and Spring quarters. The instructor is Patricia Kelly.

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Help ▾ Blog Select Language ▾ Welcome back, ProfessorNelson COWL 52 2025 Fall Logout ▾

Dashboard ▾ Portfolio Simulation ▾ Investing Research ▾ Budget Game ▾ Learning ▾ Admin ▾ Reports ▾

RANK	USER	MARKET VALUE	PORTFOLIO VALUE	TRADES MADE	% RETURN	ACTIONS
1	Keenan McDonald	104,641.13	114,176.30	10	14.18%	⊗
2	aljocoro@ucsc.edu	113,784.90	113,963.13	8	13.96%	⊗
3	anicolev	112,119.88	112,146.74	8	12.15%	⊗
4	hadinh	93,435.88	112,080.76	4	12.08%	⊗
5	fpetyrbaelish	95,492.20	111,968.43	6	11.97%	⊗
6	lhghasse	106,287.00	111,254.19	8	11.25%	⊗
7	ramahesh	110,840.74	110,929.39	6	10.93%	⊗
8	agarc664	103,610.92	110,913.56	10	10.91%	⊗
9	Taylanj18	109,741.89	110,762.94	6	10.76%	⊗
10	JGonz77256	110,328.38	110,733.12	5	10.73%	⊗
11	Jumoj Juice	109,975.44	110,658.28	7	10.66%	⊗

UPLOAD LOGO

Portfolio Charts View Positions

Asset Class Industry

Symbols Market Cap

Long Equities

My Watchlist +

Your watchlist is empty. Press the "+" above to add symbols to your watchlist.

We're Online! How may I help you today?

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## St. Clair College

**Money Matters Program**

**Client since 2024:** 16 professors, hundreds of students

**Focus:** Personal financial wellness & security

**StockTrak's role:**

- Simulated investing and portfolio management, budget game and lessons
- Safe environment to practice decisions and see outcomes

**Outcome:** Engaging learning that builds financial literacy, practical skills, and employability



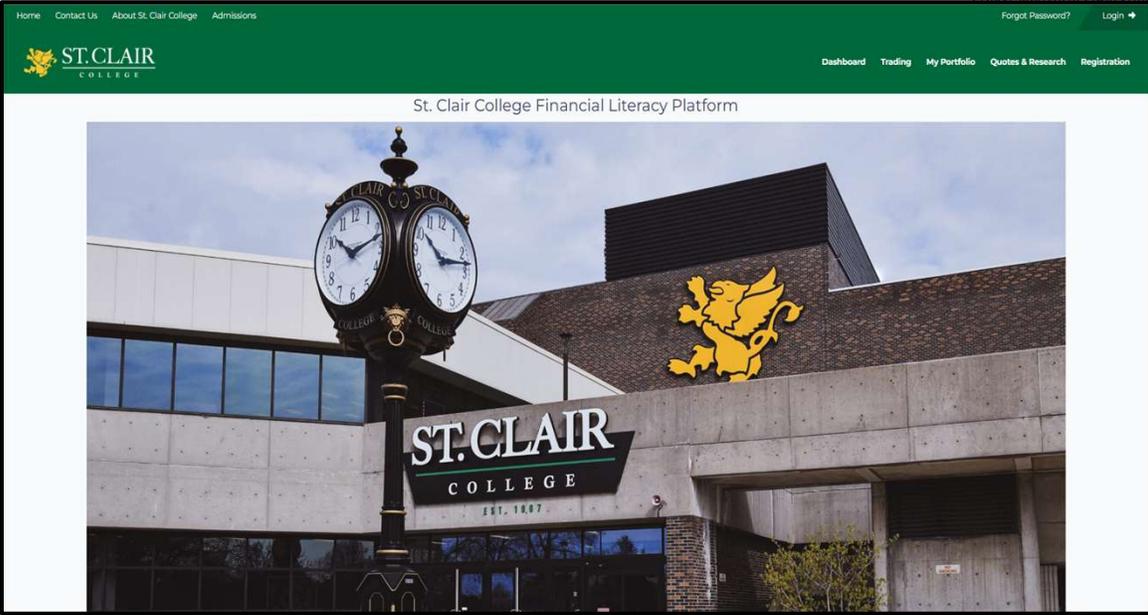
The screenshot shows the 'Money Matters' course page on the St. Clair College website. The page features a green header with the college logo and navigation links. The main content area has a background image of a lion's paw print. The course details include:

- Course Code:** SSC 169G
- Units of Credit:** 3
- Area of Interest:** General Electives & Social Sciences
- Offerings:** Continuing Education



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The screenshot shows the 'St. Clair College Financial Literacy Platform' interface. The header includes navigation links like 'Home', 'Contact Us', 'About St. Clair College', and 'Admissions'. Below the header is a large image of the St. Clair College building, featuring a prominent clock tower and the college's lion logo. The platform title 'St. Clair College Financial Literacy Platform' is centered above the image.



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ST. CLAIR COLLEGE

Budget Game Statements

Summary | Checking Statement | Savings Statement | Credit Card Statement

OVERALL GAME SCORE: **63,643** RANK: **#1**

9 MONTHS LEFT: WEDNESDAY, JUN 30, 2027

NET WORTH: \$21,416.32

OUTSTANDING BILLS: \$0.00

QUALITY OF LIFE: 20,773

BONUS POINTS: 41,000

DEBT SCORE: 727 CREDIT SCORE: 6000

Statistics Overview

Net Worth | Quality of Life | Credit Score

Net Worth Breakdown (Jan 2026)

CHECKING STATEMENT BAL.: \$944.02 UNPAID BILLS: \$0.00

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## Beyond the Investment Class: High School Recruitment

*Offers virtual trading, campus visits & scholarships to local high schools—for over 10 years!*

**Objective**  
Strengthen relationships with nearby high schools while promoting Ithaca's business program.

**Approach**  
Hosted an "Investment Day" that combines a one-day educational session with a trading competition.

**Result**  
Teachers and students gained exposure to Ithaca's experiential learning approach, supported by a professional-grade market simulation platform.

ITHACA COLLEGE

School of Business Investment Challenge

Program Features

- Real Time Trading
- 50 Global Exchanges
- Streaming Rankings
- Investment Challenge

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## Beyond the Investment Class: High School Recruiting + Revenue

Bentley University Investment Challenge  
Global Trading Platform

Learn the Global Economy Through Stock Market Simulations

Experience real-world investing and learn how our economic system works  
Develop practical investing skills  
Put classroom learnings to use in a fun, competitive environment  
Practice working collaboratively and making decisions

HIGH SCHOOL TEACHERS - SIGN UP YOUR CLASS

**Program Features**

**Real Time Trading**  
All US Stocks, ETFs, Options, Futures, Spots, and Future Options trade at real-time bid/ask prices for the most realistic simulation possible.

**50 Global Exchanges**  
Over 50 global exchanges, so students can trade securities and commodities from all over the world in the same platform, with real-time FX rates.

**Streaming Rankings**  
Compare portfolio returns over the past week, month, or the entire competition. You can also compare your risk-adjusted returns to the market.

**Professional Research**  
Get news, quotes, analyst ratings, historical prices, and option chains for every US security, plus much more. Includes real market research.

**Bentley University**

**High School Recruitment:**  
Offering virtual trading and campus visits in their summer **Wall Street 101** week-long classes for high school students for a fee.

*40 students pay \$2,000 for a week class; 4 weeks = \$320,000*

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## Beyond the Investment Class Opportunities – Dual Enrollment

**UNI** / University of Northern Iowa

Request Info Visit Apply

UNI HOME / DAVID W. WILSON COLLEGE OF BUSINESS / FINANCIAL LITERACY / ACADEMICS / HIGH SCHOOL FINANCIAL LITERACY

### High School Financial Literacy

Financial literacy education for Iowa high school students

Many of our every day decisions have a financial impact, which makes personal finance a crucial skill. It applies in almost every aspect of life. It's especially important in high school, before students venture on their own and manage their own wealth. Financial Skills for Smart Living® will fill the void in high school financial literacy education.

Financial Skills for Smart Living® is a college-level personal finance course customized for Iowa high school students and adapted for high school faculty delivery. Qualified juniors and seniors who take this course will gain a clear understanding of the fundamentals of personal finance. Unlike other high school personal finance course options, Financial Skills for Smart Living® gives students the opportunity to earn college credit after passing the final exam. In addition, high school faculty who teach the course can receive professional development and support from Wilson Business faculty and staff.

**University of Northern Iowa**

**High School Dual Enrollment:**  
High School students can take an online college class and get college credit.

**Financial Skills for Smart Living® Program**

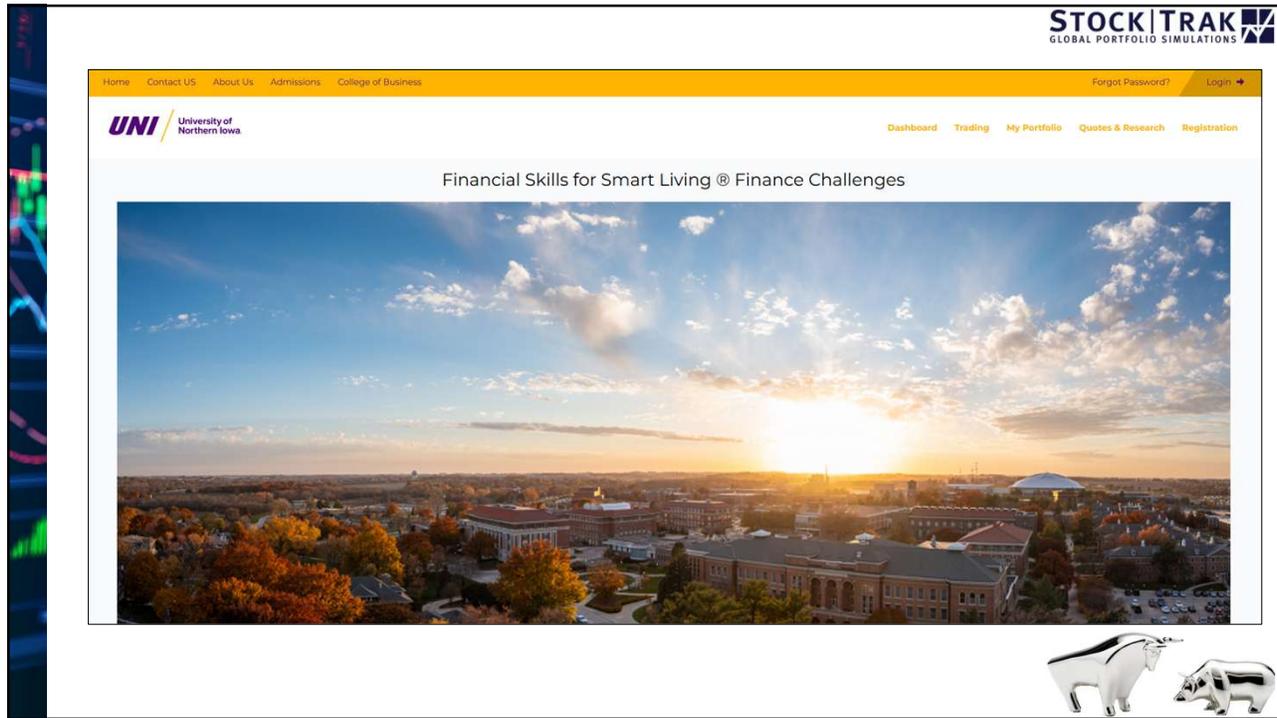
Client since 2022: **7 professors, 600+ students**

**Course focus:** Personal finance & investments for university and high school students

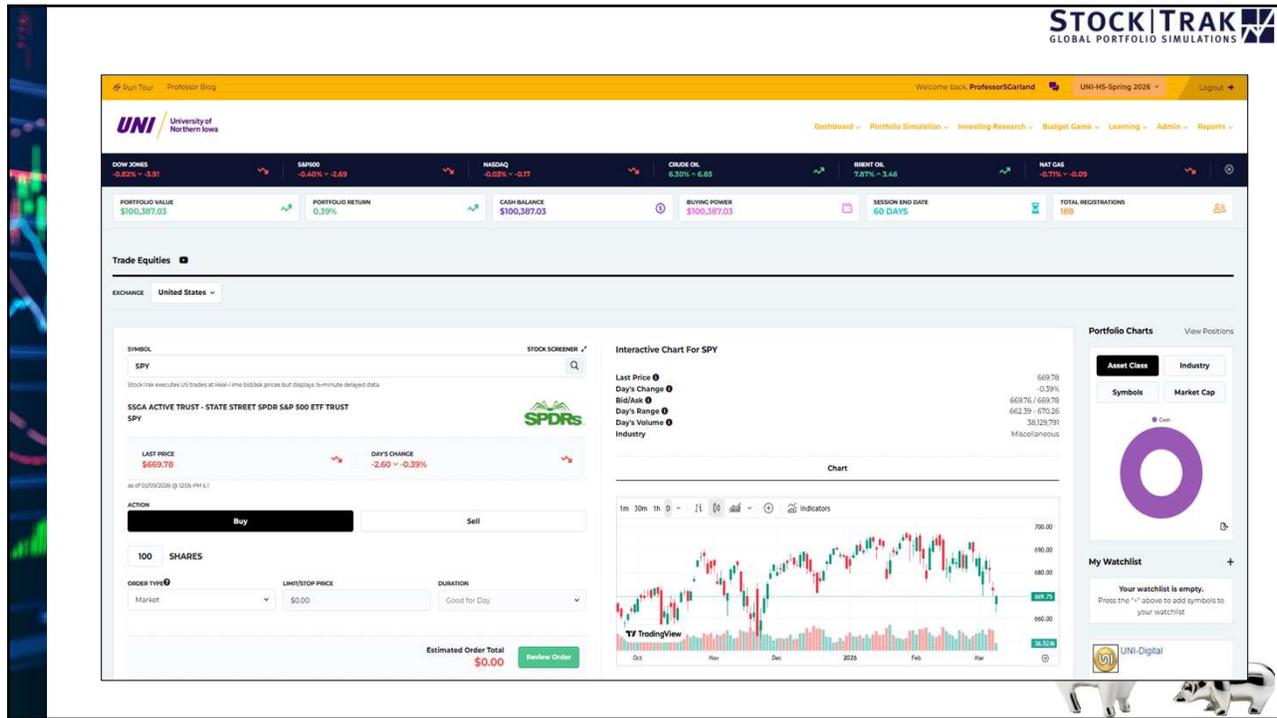
**StockTrak's role:**  
Hands-on practice managing investments and financial decisions  
Experiential learning that builds confidence and understanding

**Outcome:** Students gain hands-on investing experience and confidence managing real-life finances

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**Additional Unique Use Case for Universities**

1. All business students get a **practice virtual \$100,000 account that lasts all 4 years (especially CFA, CFP programs)**.
2. **Fund Raising:** Corporate sponsorship/branding for those firms that recruit your business majors.
3. A **pre-requisite to join the Student Managed Investment Fund** team is to have managed a virtual portfolio on StockTrak in the Investments Class.
4. Staff and **employee education** at the university.
5. **Financial aid/counseling educational offering**.



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**StockTrak Licenses**

1. **University-Branded Sites**
2. **Site Licenses to StockTrak.com**
3. **Individual Student Accounts**
4. **Digital Access Thru Campus Bookstore (Equitable and Inclusive Access)**



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