



UB Equity Research Group

Fall 2022 Trading
Challenge Overview

Overview

UBERG is hosting a Portfolio Management Competition where our goal is to allow members to become comfortable with following financial markets while seeing their investment decisions and research play out in real time.

The challenge will run from September 20th- December 6th

Once you are broken up into teams elect one member to create the team account

Competition Link: <https://www.investopedia.com/simulator/>

Game Name: UBERG Trading Fall 2022

Game Password: UBERG022!



Portfolio Rules

- Long only portfolio
- US Equities only
- Price > \$5
- Minimum of 20 holdings
- Cash position cannot exceed 5% of portfolio value
- A single equity position cannot exceed 10% of portfolio value
- Each team will have \$1 million of starting balance



Competition Structure

- **Scoring Weightings will be**
 - **60% Returns**
 - **25% Compliance**
 - **15% Slidedeck**

Compliance will be checked each weekend

Prize Structure

1st \$600

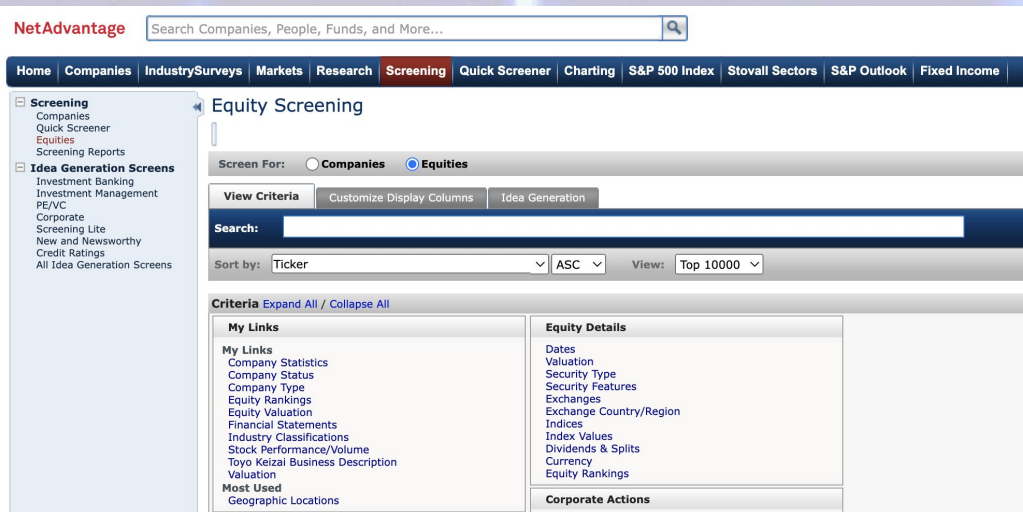
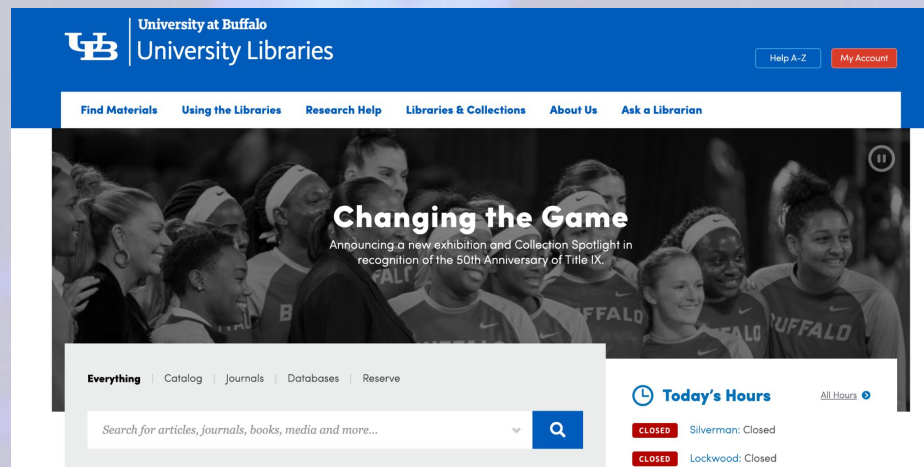
2nd \$300

3rd \$100



S&P Net Advantage

1. Go to UB Libraries (<https://library.buffalo.edu/>)
2. Search “S&P NetAdvantage”
3. Click the “Screening” header
4. Select investment criteria for your portfolio



Example: Screening for Energy Stock

- Exchanges: All US Exchanges
- Industry Classification: Energy
- Price: > \$5
- Market Cap: > \$10 Billion
- Beta (Volatility): < 1.25
- Short Interest: < 10%

NetAdvantage Search Companies, People, Funds, and More... [Contact Us](#) [Print](#) [Help](#) [Logout](#)

[Home](#) [Companies](#) [Industry Surveys](#) [Markets](#) [Research](#) **Screening** [Quick Screener](#) [Charting](#) [S&P 500 Index](#) [Stovall Sectors](#) [S&P Outlook](#) [Fixed Income](#)

Screening
Companies
Quick Screener
Equities
Screening Reports

Idea Generation Screens
Investment Banking
Investment Management
PE/VC
Corporate
Screening Lite
New and Newsworthy
Credit Ratings
All Idea Generation Screens

Equity Screening

[Go to Old Screen Builder](#)

Screen For: ☐ Companies ☒ Equities

View Criteria **Customize Display Columns** **Idea Generation** **Preview Results <<**

Reorder

1	Day Close Price [Latest] (\$USD, Historical rate): is greater than or equal to 5	102532	Edit	X	Options
2	Exchanges: All US Exchanges	12664	Edit	X	Options
3	Industry Classifications: Energy	617	Edit	X	Options
4	5 Year Beta R-Squared [Latest]: is less than 1.25	580	Edit	X	Options
5	Short Interest [Latest - 3 Month(s)] (mm): is less than 10	402	Edit	X	Options
6	Market Capitalization [My Setting] [Latest] (\$USDmm, Historical rate): is greater than or equal to 10000	126	Edit	X	Options

Search: **Add to Screen**

Sort by: View: of 126 **View Results >>**

Criteria [Expand All](#) / [Collapse All](#)

Yahoo Finance

1. Go to Yahoo Finance (<https://finance.yahoo.com/>)
2. Click the “Screening” header
3. Select investment criteria for your portfolio

The screenshot displays the Yahoo Finance website's stock screening interface. At the top, the Yahoo Finance logo is on the left, and a search bar is in the center. To the right of the search bar are links for 'Sign in' and 'Mail'. Below the search bar, there are four stock price widgets showing various symbols and their current prices with percentage changes. The main section is titled 'All Screeners / New Unsaver Screener*' with a note that it expires in a few days. Below this, there's a section for 'Build Stocks screener with filters below' with a currency selector set to 'USD'. The filter section includes several criteria: 'Region' set to 'United States', 'Market Cap (Intraday)' with buttons for 'Small Cap', 'Mid Cap', 'Large Cap' (selected), and 'Mega Cap'; 'Price (Intraday)' set to 'greater than' 5; 'Sector' set to 'Healthcare'; 'Industry' with a '+ Add Industry' button; 'Price / Earnings (P/E)' set to 'less than' 20; and 'Debt / Equity (D/E) %' set to 'less than' 1. To the right of the filters, it shows 'Estimated results' as '8'. At the bottom left, there's a '+ Add another filter' link and two buttons: 'Find Stocks' and 'Save Filters'. A 'Sign in to save your screener' link is also present.

yahoo! finance

Search for news, symbols or companies

Sign in

Mail

3,924.26 -42.59 (-1.07%)

31,318.44 -337.96 (-1.07%)

11,630.86 -154.24 (-1.31%)

1,809.75 -13.07 (-0.72%)

BRK.B -1.69%

Sign up now E*TRADE

All Screeners / New Unsaver Screener* expires in a few days, please save your screener.

Build Stocks screener with filters below Currency in USD

Region is United States

Market Cap (Intraday) is Small Cap Mid Cap Large Cap Mega Cap

Price (Intraday) greater than 5

Sector is Healthcare

Industry is + Add Industry

Price / Earnings (P/E) less than 20

Debt / Equity (D/E) % less than 1

+ Add another filter

Find Stocks Save Filters Sign in to save your screener

Estimated results 8



Helpful Tips

- **Create an IPS (Investment Policy Statement)**
 - **Determine an initial strategy (Ex: Going overweight Energy/ underweight Materials)**
 - **Have a basic outline of portfolio rules (Ex: no positions with P/E's above 50)**
- **Assign Roles/Sectors**
 - **Breakup coverage of sectors so workflow is more manageable**
 - **Discuss how you'll communicate (GroupMe, IMessage, Discord, etc.)**
 - **Assign everyone a job (ex: scheduling meetings, checking compliance, etc.)**
- **Record Notes For Buying/Selling positions**
 - **Why am I entering this position?**
 - **What am I predicting to happen?**
 - **Evaluate position and learn from winners and losers**



Resources

Research

- Yahoo Finance
- S&P NetAdvantage (Use UB libraries Database)
- Bloomberg Terminals (After 10/1)

Portfolio/Market Tracking

- Trading Economics (App)
- Wall Street Journal (<https://research.lib.buffalo.edu/w-s-j>)
- Market Watch (<https://www.marketwatch.com/>)

Email News

- Morning Brew (<https://www.morningbrew.com/daily>)
- RobinHood Snacks (<https://snacks.robinhood.com/>)
- Exec Sum (<https://www.execsum.co/>)

