

The Stock Market Game™



Advisor Checklist

Use this checklist as a guide to “what to do first, second . . . “ Active document links (underlined text) in this document can be found on the ICEE web site at www.econed-il.org.

Veteran SMG teachers advise First-time SMG teachers to keep their first implementation simple. Only attempt what you have time for. Your next implementation of the SMG can be more advanced and incorporate more resources, if you wish. Don't tackle too much!

1. Log on to the SMG program with your Administrative ID and password, to access the wide range of curricula and program resources available to you as a registered SMG teacher.
 - a. Go to Illinois.smgww.org
 - b. Log in with your Administrative ID (the ID with the capital letter “T” in it)
 - c. Check out **Understanding SMG**. This section includes the *Teachers Guide*, *Understanding Portfolios* and *Rules of the Game*. First timers are wise to begin here!
 - d. **In The Classroom** includes lessons, activities and projects. You can select by lesson sequence, standards correlation or by grade, subject and mastery level, to generate a complete course outline. You'll also find assessments in the form of pre-and post-tests in the core areas.
2. Form your students into teams of 3 to 5, keeping a record of the assignment. A maximum of five students per team will be recognized with awards if winner. Download [Team Member Assignments and Roles](#) and [Using Cooperative Learning Teams](#) from the ICEE web site.
3. Determine the availability of computers at your school. Poll students for those with home Internet access, dividing your teams so each group has at least one student with Internet access at home in case that team does not find Internet time at school when they need it.
4. Download, print and reproduce [Student Agreement](#) from the ICEE web site. This is especially helpful for students who do not yet understand that a simulated online portfolio is managed by a team as opposed to an individual, and that a level of security is necessary to maintain the integrity of that portfolio.
5. Helpful: Letter to parents explaining the possible need for students' use of the Internet at home, as it relates to the SMG program. Encourage student/parent interaction in the portfolio review and stock research process, when done from home. Team portfolios will remain accessible online for review, for about six weeks after the end of your session. Download [Letter To Parents](#) from the ICEE web site.
6. Contact a local Financial Advisor or stock broker, to speak to your class about stock market basics, and to serve as a resource to you on basic terms and market operations. Download the resource [Broker Presentations](#) to help prepare your guest for their classroom visit.

7. Did you receive a confirmation e-mail with ID's for the correct number of teams? If you are not assigned the number of teams you wanted, either too many or not enough, you **MUST** contact ICEE at once to correct this very expensive and/or troublesome problem. Even if your fees are waived through a sponsorship, an incorrect number of teams has broad ramifications. Phone toll-free 877-I DO ECON to change the number of teams. Check the Illinois information pages of SMG for current rules as to add/delete deadlines, under the tab "*Participation and Fees.*" (at <http://illinois.smgww.org>)
8. As soon as you have the correct number of team ID's, assign those numbers to specific teams. Record, for your reference, to which student group each ID/Team Number has been assigned. **DO NOT, under ANY circumstances, mistakenly assign the same team number to two different groups of students.** As soon as team numbers are received, teams can access their SMG portfolio account for purposes of acquainting themselves with the web site, reading the program rules, and conducting stock research. Trades will not be accepted before your session's first date.
9. If you have been scheduled for newspaper delivery as part of your SMG participation, work out delivery details with other school personnel. If there is a big stack, how many do you get, and where should they be taken – and by what time of the morning?. Teachers scheduled for Chicago Tribune delivery should phone 630.368.4200 if they have any delivery questions or problems. Leave a detailed message with the best time they can call you back.
10. Pre-Test Assessment. See the *Assessments* section under **In The Classroom** in the Teacher Support Center. You can select assessments by grade level and learning topic.
11. OPTIONAL but recommended: Show the video "The Stock Market Adventure" with host Peter Lynch. This 8-minute video is a good prelude to the SMG unit. It will help interest your students in researching their upcoming investments. [Order the video](#) from ICEE; download the video's [Teacher's Guide](#).
12. OPTIONAL: Bulletin Board. Download [Bulletin Boards](#) for the SMG from the ICEE web site.
13. Study the following topics: (Search for grade- and subject- appropriate lessons on these topics using the *Lesson Sequence* section under **In The Classroom** in the Teacher Support Center.)
 - What is a company?
 - What is a stock?
 - What is a ticker symbol?
 - What is risk?

14. Explain the following information about the SMG before trading begins:

- The purpose of the SMG simulation as an educational experience – stocks as investments in the context of saving and personal finance. For background, see *Our Philosophy* under the **In the Classroom** section of the Teacher Support Center.
- Rules of the activity and where to find them. Teams will find a link to *Rules* on their portfolio Welcome Screen.; YOU have a link in the Teacher Support Center under the section **Understanding SMG**.
- How to choose stocks for the team portfolio. How should the team make decisions?
- How to set up a team portfolio. Consider the Game rules which state Illinois teams must invest in at least four stocks, with no more than 30% of their equity in any one stock. Discuss the concept of diversification. Download [Maximum Equity](#).
- In consideration of the Maximum Equity rule, discuss the concept of diversification. Search for this topic under In The Classroom in the Teacher Support Center.
- Where should students look for Internet research? In the SMG portfolio simulation alone, or in additional sites you recommend? (The team portfolio's Welcome Screen includes a link at the bottom, "Outside Links" – which are program-endorsed research sites; YOU have "Related Links" in the Teacher Support Center under the section **Understanding SMG**.)
- Importance of record-keeping and how to complete record-keeping forms or spreadsheets that you may have developed.

15. Beginning to trade (buy or sell)

- Students submit trades via the SMG web site. They should log in with their team ID at <http://stockmarketgame.org>. Bookmark their computers with that login screen.
 - More than one team member can be logged in to the same account at the same time. This is only advised if the students are conducting research and/or reviewing their portfolio report pages. However, when it comes to the act of buying and selling, they should communicate which *ONE* team member will take that action, at their request.
- Students complete record-keeping worksheets or spread sheet which you have developed.
- The day following trading, or on any subsequent day that fits your schedule, teams compare actual portfolio data to worksheet records – or on any subsequent day that fits your schedule.

16. Review the following after the start of the SMG simulation:

- How to read company portfolio and financial reports. Find lessons through a search in the **In the Classroom** section of the Teacher Support Center.
- Impact of various current events on stocks in teams' portfolios (Download [Stock Market Scavenger Hunt](#) and [How to Relate the News of the Day to Stock Prices](#) from the ICEE web site.)
- How to chart stock prices (especially let students see the charts available at <http://finance.yahoo.com> and <http://bigcharts.marketwatch.com>)
- Where to find regional ranking reports for competition with other schools. (Teams find a link to Rankings at the bottom of their Welcome Screen; YOU access rankings by selecting *View Rankings & Portfolios* under the **Manage Student Portfolios** section of the Teacher Support Center.)
- Review and print the Regional Rankings report once weekly and post in a location accessible to all students in the school.

17. OPTIONAL but recommended: Download your grade-specific essay topic from [InvestWrite](#). Incorporate a language arts component into the SMG program by having students write a brief essay on the given topic. You can submit your best three essays, per class, into the national competition. Prizes are significant and include trips to Disney World, laptop computers and U.S. Savings Bonds! Make note of the deadline for entries and the date winners will be announced.
18. Post-Test Assessment. See the *Assessments* section under **In The Classroom** in the Teacher Support Center. You can select assessments by grade level and learning topic.
19. Optional
- Explain Margin Accounts - borrowing money over the original \$100,000. Download [Doodling in the Margin](#) from the ICEE web site and search for this topic under the **In the Classroom** section of the Teacher Support Center.
 - Explain Short Sales and Short Covers – trading a stock they never own based on the premise that the stock will go down in value. Download [Selling Your Stock Short](#) from the ICEE web site and search for this topic under the **In the Classroom** section of the Teacher Support Center.
 - Teach about Mutual Funds. Search for this topic under the **In the Classroom** section of the Teacher Support Center; see [the section Mutual Funds](#) in the SMG Resources section of the ICEE web site. Your students have access to learning information about Mutual Funds by clicking on the *Mutual Fund* tab in their portfolio.
 - Determine the feasibility of offering small prizes or rewards for class- or school-wide competition of SMG teams, based either on the teams' *Equity in Portfolio* value or on their *Relative Ranking to the S&P 500* – both values appear in the Regional Ranking report.
 - Download the [Participation Certificate](#) to provide recognition to students in your class.