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of the* **sifma**

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SMG PROGRAM GUIDE

Self-Guided Video Edition

Welcome to The Stock Market Game!

Welcome to the SIFMA Foundation's Stock Market Game! This guide is designed to introduce participants of all ages to the exciting world of stock market investing. Whether you're a beginner or looking to sharpen your skills, our structured program will help you enhance your learning experience. Every section follows a clear, repeatable format: **Watch** → **Learn** → **Practice** → **Extend**. Start with the self-guided video focused on one investing topic, then choose from ready-made supplemental activities to reinforce learning. Want to go deeper? Use the optional extensions, including bonus videos or hands-on tasks. This format is designed to be simple, consistent, and flexible—making it easy for you to go at your own pace..

01. INTRO TO SMG

What is financial literacy
SMG portfolio navigation
Short-term v. Long-term goals



02. COMPANIES & STOCKS

Saving v. Investing
Stock Overview
Ticker symbols & company data



03. CONDUCTING RESEARCH

Reading a Stock Quote
News & Analysis
Company Considerations



04. ASSESSING RISK

Personal risk tolerance
Aligning investment choices
Diversification overview

05. INTRO TO MUTUAL FUNDS

Understanding mutual funds
Key considerations & benefits
Researching mutual funds



06. INTRO TO BONDS

Bond overview & research
Bond types & characteristics
Executing bond transactions



07. PORTFOLIO EVALUATION

Decision making strategies
Money goals v. market conditions
Utilization of key financial reports



08. REFLECTION & NEXT STEPS

Reinforcing key terms
Setting actionable next steps
Financial guidance across ages

SMG Quick Start Trading Videos

Our brief, step-by-step videos show you exactly how to use the Stock Market Game portfolio. You'll learn how to navigate each section of the SMG portfolio, how to enter trades for stocks, bonds, and mutual funds, check your transaction history, and track your investments in real time. Perfect for quickly getting up to speed and making confident moves in the game.



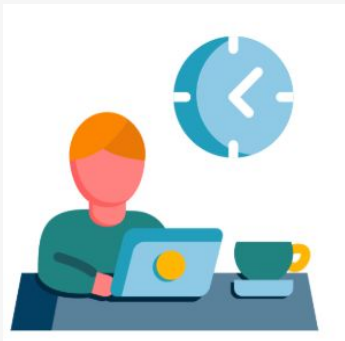
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SMG Support Pathways

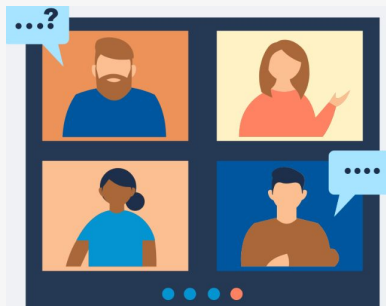


LIVE OFFICE HOURS

SMG advisors can join office hours to ask questions, brainstorm ideas, and connect directly with experienced educators. These informal drop-in sessions offer personalized support for navigating the SMG platform, implementing grade-level strategies, and boosting student engagement. [Click here](#) to view dates and times.

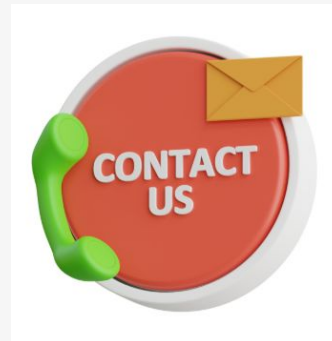


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INSTRUCTIONAL WEBINARS

Live instructional webinars are available to support SMG advisors throughout the game session. These sessions will cover a range of topics including getting started with the SMG platform, teaching investing fundamentals, engaging students in real-world financial learning, and making the most of available resources. [Click here](#) to view upcoming dates and times.



CONNECT WITH US

Available throughout your SMG experience, contact us via email at smg@sifma.org for more direct support and to connect with your local Stock Market Game Coordinator. Follow us on social media for more SMG tips and future events! @sifmafoundation across all platforms.



01

INTRO TO SMG

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VIDEO ONE

INTRO TO SMG

This video introduces viewers to The Stock Market Game™ (SMG). Viewers will discover how to participate in the game using a virtual \$100,000 portfolio, make informed decisions based on real-world market trends, and compete in rankings. The video emphasizes that the SMG is a safe, risk-free way to gain practical investing experience, while also teaching valuable financial concepts such as portfolio management, stock selection, and investment strategies



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Unlocking the Power of The Stock Market Game™ *Your Path to Financial Success*



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VIDEO ONE

INTRO TO SMG



LEARNING GOALS

Understand the purpose and benefits of SMG
Navigating the SMG portfolio
Exploring the basics of investing
Developing financial goals



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ACTIVITIES

[SMG Portfolio Scavenger Hunt](#)
[Setting Financial Goals](#)



EXTENSION

[Financial Goal Vision Board](#)



02

COMPANIES & STOCKS

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VIDEO TWO

COMPANIES & STOCKS

This video introduces viewers to the basics of companies and stocks. Viewers will learn the difference between saving and investing, how companies raise money by selling stocks, and how to identify stocks using ticker symbols. The video also demonstrates how to search for stocks within *The Stock Market Game* (SMG) and conduct company research.

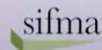


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Unlocking the Power of The Stock Market Game™ *Introduction to Companies & Stocks*



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VIDEO TWO

INTRO TO COMPANIES & STOCKS



LEARNING GOALS

Learn how stocks work
Understanding the role of exchanges
Identify ticker symbols
Assessing company data



ACTIVITIES

[Jimmy's Birthday Present](#)
[SMG Video Reflection](#)
[Market Match Game](#)
[Company Snapshot](#)



EXTENSION

[Intro to IPO's](#)



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03

CONDUCTING RESEARCH

VIDEO THREE

CONDUCTING RESEARCH

This video introduces viewers to the importance of conducting research before investing. Viewers will learn how to analyze a company's stock quote, understand key financial indicators, and use tools like Yahoo Finance to gather essential data. The video also covers how to research companies within *The Stock Market Game* (SMG) platform and navigate the trading process.

Unlocking the Power of The Stock Market Game™ *Conducting Research*



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VIDEO THREE

CONDUCTING RESEARCH



LEARNING GOALS

Importance of research before investing
How to read a stock quote & key terms
Develop research skills using financial tools
Navigate the trading process in SMG



ACTIVITIES

[Decoding the Stock Quote](#)
[Practice Makes Profit](#)



EXTENSION

[P/E Ratio Explained](#)



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04

ASSESSING RISK & DIVERSIFICATION



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VIDEO FOUR

ASSESSING RISK & DIVERSIFICATION

Nvideo explores the concept of risk in investing and the importance of diversification. Viewers will learn how to assess their personal risk tolerance and understand how different investment choices align with their comfort levels. The video introduces diversification as a strategy to manage risk by spreading investments across different asset classes, sectors, regions, and company sizes.



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Unlocking the Power of The Stock Market Game™ *Assessing Risk & Diversification*



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VIDEO FOUR

ASSESSING RISK & DIVERSIFICATION



LEARNING GOALS

Understanding risk in investing
Importance of diversification
Building a balanced portfolio
Applying risk management in SMG



ACTIVITIES

[Risk Tolerance Quiz](#)
[Assessing Risk Tolerance](#)
[Sectors and Industries](#)
[Creating a Diversified Portfolio](#)



EXTENSION

[Investing In A Down Market](#)
[Understanding Short Selling](#)
[Buying on Margin](#)



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05

INTRO TO MUTUAL FUNDS



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VIDEO FIVE

INTRO TO MUTUAL FUNDS

This video introduces viewers to mutual funds as an equity saving and investment option. Viewers will learn the benefits of mutual funds, key factors to consider when researching mutual funds, and how to research mutual funds using financial news sites and execute mutual fund trades within the SMG platform.



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Unlocking the Power of The Stock Market Game™ *Intro to Mutual Funds*



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VIDEO FIVE

INTRO TO MUTUAL FUNDS



LEARNING GOALS

- Understanding mutual funds
- Benefits of mutual funds
- How to research mutual funds
- Executing mutual funds in SMG



ACTIVITIES

- [Fund Find](#)
- [Intro to ETF's](#)



EXTENSION

- [Create Your Own Mutual Fund](#)



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06

INTRO TO BONDS



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VIDEO SIX

INTRO TO BONDS

This video introduces viewers to bonds as a lower-risk investment option. Viewers will learn the benefits of bonds, the different types of bonds available, and key characteristics that distinguish bonds from stocks. The video also covers how to research bonds, understand bond ratings, and execute bond trades within the SMG platform.

Unlocking the Power of The Stock Market Game™ *Intro to Bonds*



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VIDEO SIX

INTRO TO BONDS



LEARNING GOALS

Understanding bonds as an investment.
Types of Bonds
Key bond characteristics
How to research and trade bonds



ACTIVITIES

[Bonding Time](#)
[Finding Bonds](#)



EXTENSION

[Investing in Bonds Video](#)
[Diversifying with Bonds](#)



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07

PORTFOLIO EVALUATION



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VIDEO SEVEN

PORTFOLIO EVALUATION

This video introduces viewers to portfolio evaluation and decision-making strategies in the Stock Market Game. Viewers will learn how to assess their portfolio, determine whether to buy, sell, or hold investments, and use key financial reports to make informed decisions.

Unlocking the Power of The Stock Market Game™ *Portfolio Evaluation*



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VIDEO SEVEN

PORTFOLIO EVALUATION



LEARNING GOALS

How to evaluate a portfolio
Buy, sell or hold decisions
Using financial reports
How to assess gains and losses



ACTIVITIES

[Unrealized Losses](#)
[Buy, Sell or Hold](#)
[Asset Allocation](#)



EXTENSION

[Intro to Sustainable Investing](#)
[Building a Sustainable Portfolio](#)
[Cryptocurrency & SMG](#)



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REFLECTION & NEXT STEPS



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VIDEO EIGHT

REFLECTION & NEXT STEPS

Participants to reflect on their investment journey and plan their next steps.

Viewers will revisit key financial concepts, receive tailored financial guidance for different age groups, helping participants set goals, develop smart money habits, and take actionable steps toward long-term financial success.



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Unlocking the Power of The Stock Market Game™ *Reflections & Next Steps*



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VIDEO EIGHT

REFLECTIONS & NEXT STEPS



LEARNING GOALS

Understand key investment concepts
Set age-appropriate financial goals
Take practical steps toward investing
Embrace financial growth as a lifelong journey



ACTIVITIES

[What Would You Do](#)
[Transaction History Review](#)
[My Financial Path](#)



EXTENSION

[Community Challenge - Paying it Forward](#)



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Thank you for participating!

We're so glad the Stock Market Game community! Whether your portfolio soared or you learned through trial and error, you've taken valuable steps toward financial literacy and real-world decision-making.

What's Next?

✓ **Celebrate Your Success:** Share your portfolio results and reflections with your class, family, or community. Download your participation certificate [here](#).

🧠 **Keep Learning:** Follow financial news and practice watching market trends.

📧 **Stay Involved:** Visit www.stockmarketgame.org to register for upcoming Fall, Spring, or Year-Long Game Sessions.



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Spread the Word

Loved the experience? Help others discover it too!

Pitch SMG to Your School, Club or Firm: Share how SMG helped you learn and grow to inspire peers, clubs, school boards, and firms to participate in the next game session. Download and share an SMG flyer for easy distribution.

- [About SIFMA Foundation](#)
- [SMG Club Flyer](#)

Share on social media: Post your SMG experience or certificate and tag @sifmafoundation on all platforms.

Become an SMG Ambassador: Ask your advisor how you can help support future sessions or mentor new participants.

Every share helps grow a community of confident, financially capable individuals and helps us reach our goal of reaching 1 million students each school year!

 See You Next Season!



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