



A program
of the



FOUNDATION

SMG PROGRAM GUIDE

A Self-Paced, Asynchronous Path Through The Stock Market Game



FOUNDATION



Welcome to The Stock Market Game!

This guide introduces participants of all ages to the exciting world of stock market investing. Every section follows a clear, repeatable format. Start with a self-guided video on one investing topic, then choose from ready-made activities to reinforce learning. Want to go deeper? Use the optional extensions, including bonus videos and hands-on tasks. Simple, consistent, and flexible so you can go at your own pace.



1. WATCH

View the self-guided video
for the topic



2. LEARN

Review the section's
learning goals



3. PRACTICE

Complete the hands-on
activities



4. EXTEND

Go further with bonus
videos & tasks

Topics at a Glance

#	LESSON	FOCUS
KICKOFF	<u>Your First Trade</u>	Establishing your investment baseline
1	<u>Intro to SMG</u>	Setting personal financial goals
2	<u>Intro to Companies & Stocks</u>	Connecting brands to public companies
3	<u>Conducting Research</u>	Reading and interpreting a stock quote
4	<u>Assessing Risk & Diversification</u>	Matching risk tolerance to life circumstances
5	<u>Intro to Mutual Funds</u>	Exploring mutual funds as a beneficial, low-pressure option to diversify
6	<u>Intro to Bonds</u>	Understanding bonds as a fixed-income asset
BONUS	<u>Show What You Know!</u>	Test your understanding with SMG InvestQuest (SMG IQ)
7	<u>Portfolio Evaluation</u>	Reading annual reports to decide buy, sell, or hold
8	<u>Reflection & Next Steps</u>	Reflecting on growth & portfolio performance

SMG Quick-Start Trading Videos

Our brief, step-by-step videos show you exactly how to use the Stock Market Game portfolio: navigating each section, entering trades for stocks, bonds, and mutual funds, checking transaction history, and tracking investments in real time. Perfect for quickly getting up to speed.



The Stock Market Game Trading Portfolio

[▶ Watch on YouTube](#)



Entering Bond Trades

[▶ Watch on YouTube](#)



Entering Mutual Fund Trades

[▶ Watch on YouTube](#)



Building Your Portfolio

[▶ Watch on YouTube](#)

SMG Support Pathways



Live Office Hours

SMG advisors can join office hours to ask questions, brainstorm ideas, and connect directly with experienced educators — informal drop-in sessions for platform support, grade-level strategies, and student engagement.

[Click here to view dates and times](#)



Instructional Webinars

Live webinars support SMG advisors throughout the game session — covering getting started with the platform, teaching investing fundamentals, and engaging students in real-world financial learning.

[Click here to view upcoming dates and times](#)



Connect With Us

Email us at smg@sifma.org for all SIFMA Foundation program inquiries, or connect with your local Stock Market Game Coordinator for SMG-specific support. Follow [@sifmafoundation](#) for tips and events.

smg@sifma.org

Your First Trade



LEARNING GOAL

Before researching companies or strategies, place one trade based on what you already know. There's no right answer — the goal is to capture your thinking now, to see how it changes as you learn.



ACTIVITY

[Your First Trade](#)



EXTENSION

Reflect on the following:

- What did I know when I made this trade?
- What do I know now that I didn't then?
- Would I make the same trade today? Why?
- How did it perform vs. my later trades?

01

INTRO TO SMG

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 SMG is a safe, risk-free way to gain practical investing experience, while teaching valuable financial concepts such as portfolio management, stock selection, and investment strategies.

► [Watch this video](#)



Intro to SMG



LEARNING GOALS

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



ACTIVITIES

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



EXTENSION

- ▶ [Financial Goal Vision Board](#)

02

INTRO TO COMPANIES & STOCKS

Intro to 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.

► [Watch this video](#)



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](#)

03

CONDUCTING RESEARCH

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 SMG platform and navigate the trading process.

▶ [Watch this video](#)



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](#)

04

ASSESSING RISK & DIVERSIFICATION

Assessing Risk & Diversification

This video 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.

[▶ Watch this video](#)



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](#)

05

INTRO TO MUTUAL FUNDS

Intro to Mutual Funds

This video introduces viewers to mutual funds as an additional 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.

[▶ Watch this video](#)



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](#)

06

INTRO TO BONDS

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.

▶ [Watch this video](#)



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](#)

BONUS • SHOW WHAT YOU KNOW

SMG InvestQuest (SMG IQ)

[PLAY NOW](#)

Choose from Beginner, Intermediate, or Advanced level and use historical market data to maintain and grow a virtual portfolio, putting long-term investing, diversification, and risk management into practice over quarterly time periods.



30–40 MIN

PLAY TIME



\$100,000

STARTING VIRTUAL PORTFOLIO



3 YEARS

SIMULATED TIME PERIOD

CHOOSE YOUR LEVEL



Beginner



Intermediate



Advanced

Why it's a great bonus: A fun, low-stakes way to gauge your understanding of core investing concepts — SMG IQ results don't affect SMG portfolio choices or equity.

07

PORTFOLIO EVALUATION

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.

► [Watch this video](#)



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](#)

08

REFLECTION & NEXT STEPS

Reflection & Next Steps

This video encourages 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, and take actionable steps toward long-term financial success.

► [Watch this video](#)



Reflection & 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](#)

Thank You for Participating!

We're so glad to have you as part of 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](#)



Keep Learning

Follow financial news and practice watching market trends.



Stay Involved

Register for upcoming Fall, Spring, or Year-Long Game Session.

www.stockmarketgame.org

Help Others Discover SMG

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.

[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 session!