

FINLIT



THE \$1M MANDATE SIMULATION • YEARS 10 TO 13

The Sovereign Capital Challenge.

Five days on your campus, then a 15-day live sprint. Student analyst firms run a \$100,000 seed fund on real markets, then pitch an Institutional Investor panel for the full \$1,000,000 mandate.



5

DAYS, IN SCHOOL

15

DAYS OF LIVE SPRINT

10-13

YEARS

LEARN WITH
LEADERS



IN PARTNERSHIP WITH



HPAIR
HARVARD COLLEGE PROJECT FOR ASIAN AND INTERNATIONAL RELATIONS

Welcome to the trading floor. You are now a **Boutique Fund Manager**.

This is not a school competition. A high-net-worth Institutional Investor has entrusted your student analyst firm with \$100,000 of seed capital on MarketWatch to evaluate your discipline, strategic rationale and risk defense.

Your objective across the 20-day journey is to preserve and grow that seed fund. At the Grand Finals you present your track record to the Investor panel and make the case that your firm has the discipline, insight and composure to manage a full \$1,000,000 portfolio.



WHAT MAKES IT FUND-GRADE

Real markets, real capital

Every team runs a live \$100,000 paper fund on MarketWatch from Day 1. Market and limit orders, stop-losses, real tickers, real prices.

From consumer to owner

Revenue versus net profit, the P/E ratio, the economic moat. Students learn why a great product does not always equal a cheap stock.

Technicals and risk architecture

Candlesticks, moving averages, RSI and volume on Day 3. Diversification caps, cash buffers and stress tests on Day 4. Never lose the client's principal.

Process over luck

An auditable Trade-Reason Log for every position and a boardroom pitch that defends losers with composure. The pitch is the assessment.



THE EXPERIENCE, AT A GLANCE

Program details

PROGRAM DATES

1 to 5 February 2027

FORMAT

In-person at Kings' School Al Barsha

DURATION

5 consecutive days, then a 15-day live sprint

ELIGIBILITY

Years 10 to 13

20 to 30 students per cohort · Teams of 4 to 5

FACILITATION

Taught by Harvard student mentors

One mentor to every 20 students, on campus all week and through the sprint

RECOGNITION

Certificate of Participation by Harvard College Project for Asian and International Relations

Learn the principle. Run the drill. Place the trade. *Ship the deliverable.*

	DAY 1 Finance first principles & first trade	DAY 2 Fundamentals & corporate due diligence	DAY 3 · ADVANCED DAY Advanced technicals & trend timing
Concepts	- How the economic world works, by analogy: capital and profit (the lemonade stand), demand and supply (the concert ticket), compounding (the snowball). - Then the stock market demystified: what a share is, what a market is, and the anatomy of a ticker: symbols, market cap, live bid and ask.	- Moving from consumer to owner: why a great product does not always equal a cheap stock. - Revenue (top line) versus net profit (bottom line). - The P/E ratio made simple: how many dollars are you paying for \$1 of profit? - The economic moat: brand loyalty, patents, switching costs, network effects.	- Technical analysis as market psychology. - Candlestick anatomy: green and red bars, wicks, support floors and resistance ceilings. 50-day and 200-day moving averages. - RSI: euphoria above 70, panic below 30. - Volume: real accumulation versus low-volume traps.
Labs & drills	- MarketWatch registration lab: every firm onboarded with \$100,000 seed. - Execution masterclass: market versus limit orders. - Live trade drill: pick one familiar business, verify the ticker data, place the first buy order.	- Corporate face-off lab: Apple versus Microsoft, or Nike versus Adidas, on real-time P/E and profit margins. - Write a 200-word investment memo on long-term staying power. - Place two fundamentally backed equity trades.	- Chart overlay lab: plot the 50-day SMA, 200-day SMA and RSI on watchlist assets. - Set automated stop-loss orders to protect seed capital. - Execute one trend-confirmed technical trade.
Ships	Active MarketWatch account and first live paper trade	Fundamental Due Diligence Memo on 2 core holdings	Annotated technical chart and executed stop-loss protection log

Protect the principal. *Then pitch like an asset manager.*

DAY 4 Risk architecture & the trade log habit		DAY 5 Mock partner pitch & live sprint hand-off	
Concepts	• The cardinal rule of fund management: never lose the client’s principal. • Diversification across asset class and sector, with a hard 20% cap on any single asset. • Portfolio beta and cash buffers: holding 5 to 10% dry powder for corrections. • The professional habit: a Trade-Reason Log with catalyst, horizon, stop-loss and profit target.		• The art of the pitch: communicating like an asset manager, not a gambler. • Process over short-term luck. • The deck blueprint: macro overview, portfolio health, winners and losers post-mortem, 15-day forward outlook. • Boardroom cross-examination: defending underperforming positions with composure and intellectual honesty.
	Labs & drills		• Live portfolio stress test: simulate a 5% market drop and measure drawdown exposure. • Rebalance into a resilient 60/40 core-and-satellite structure. • Set up the firm’s official Trade-Reason Log for compliance audit.
Ships	Auditable Trade-Reason Log and portfolio diversification matrix		Day 5 mock pitch deck and partner evaluation rubric

Cumulative by design. Day 1's first trade becomes Day 2's memo, Day 3's protected position, Day 4's logged portfolio and Day 5's pitch. Nothing is thrown away.

Every day ends on the platform. A concept is never left on the whiteboard. Each block closes with a live move on the fund and a written reason for it.

The camp ends. *The fund keeps running.*

For fifteen days each firm manages its \$100,000 seed fund independently on MarketWatch, under the rules set on Day 4 and handed off on Day 5. Then the Grand Finals: the firm presents its 20-day track record to the Institutional Investor panel and pitches for the \$1,000,000 allocation.

PHASE 2 · SPRINT RULES OF THE FIRM

- 01 No single asset above a hard 20% of the portfolio.
- 02 Hold 5 to 10% in cash as dry powder for corrections.
- 03 Every position carries a stop-loss set on MarketWatch.
- 04 Every trade is entered in the Trade-Reason Log first: catalyst, horizon, stop-loss, profit target. The log is auditable at the finals.

PHASE 3 · THE GRAND FINALS DECK

Macro overview

What the market did over the 20 days and how the firm read it.

Portfolio health

Allocation, diversification matrix, cash buffer, drawdown exposure.

Winners & losers

A post-mortem on every position, backed by the Trade-Reason Log.

Forward outlook

The 15-day view ahead and the case for the \$1M mandate.

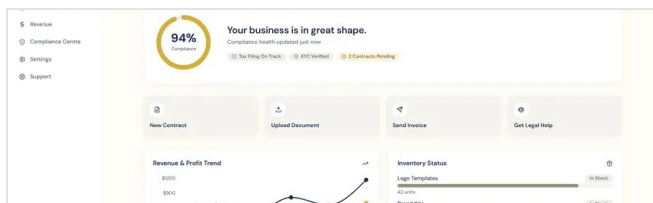
WHAT THE INVESTOR PANEL EVALUATES

Discipline, strategic rationale, risk defense, and composure under cross-examination.

Process beats short-term luck. A firm that lost a little with a clean log and a defended thesis outranks one that gained on a lucky, undocumented bet.

What students *actually* build.

Real capstones from FinLit fellows: ventures they scoped, products they designed, and portfolios they built and defended live in front of a mentor. Every project is published at joinfinlit.com/lab.



VENTURE · LEGAL TECH

TeenVenture: compliance for teen founders.

A legal compliance platform for teenage entrepreneurs: understand your obligations, protect the venture, check your compliance status before problems arise.

S. Koyande



VENTURE · SUSTAINABILITY

Last Mile: rooftops into farms.

Turns unused urban rooftops into community gardens for apartments, schools and offices. Revenue from installs, subscriptions, produce and CSR partnerships.

V. Kandru

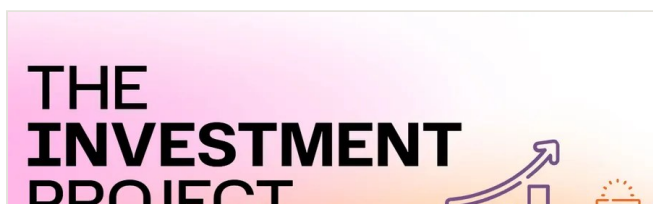


PORTFOLIO · GROWTH

\$10,000 aggressive growth.

Seven high-conviction holdings, 90% equities, about 15.5% target annual growth. Each pick backed by research and a PEG-ratio price check.

V. Pena



PORTFOLIO · GLOBAL

The Investment Project: across continents.

A portfolio for a busy university student: diversified across sectors and national markets, with a safe share in bonds for stability.

L. Wong Alvino da Costa

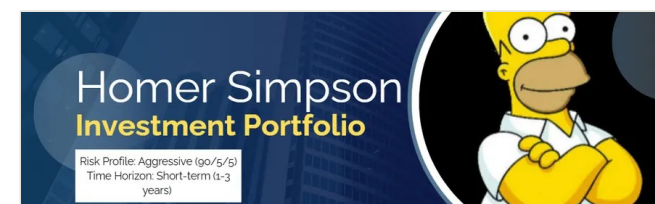


PRODUCT · HEALTHCARE

HomeWell Health: care that comes to you.

An app for booking medical services from home, built for people whose long hours and travel distances make regular doctor visits hard.

N. Chaudhary



PORTFOLIO · PERSONA

The Homer Simpson portfolio.

Portfolio construction taught through a persona. Every allocation decision grounded in one character's habits, lifestyle and risk appetite.

A. Falcioni

Designed by educators. *Run by Harvard students.*

Every firm is led by a current Harvard undergraduate or graduate. They run the MarketWatch labs, act as the senior partner in the mock pitch, stay with the firm through the 15-day sprint, and sit on the Grand Finals panel.



Kelly, Harvard '27. Applied Math and Statistics. Applied AI research, election forecasting, full-stack product.



Tsion, Harvard, Government. Education equity and youth mentorship across Harvard Model Congress and community programs.



Jerelyn, Harvard '25, cum laude. Psychology with Economics. Analyst at Citi, prior Bain and Moderna.

WHY THIS WORKS

Analogy first, jargon second

The lemonade stand before gross margin. The concert ticket before supply and demand. Every term arrives with a picture.

Live from Day 1

The first real order is placed before lunch on Day 1. Nothing is hypothetical after that.

Risk before returns

Stop-losses on Day 3, caps and cash buffers on Day 4. Students learn to protect the principal before they learn to chase a gain.

The pitch is the assessment

A boardroom, a panel, and cross-examination on the positions that went wrong. Composure is graded.

WHAT A MENTOR DOES ACROSS THE 20 DAYS

- | | |
|---|--|
| 01 Runs the MarketWatch labs and checks every deliverable before it ships. | 02 Plays senior partner in the Day 5 mock pitch and critique. |
| 03 Audits the Trade-Reason Log through the sprint. | 04 Sits on the Grand Finals panel and grades the pitch. |

1 Harvard student mentor to 20 students, in the room all week.

How to bring the Challenge *to your school.*

One booking. We bring the mentors, the labs, the fund platform, the sprint and the finals panel. Here is the whole journey, from first call to certificates.

- | | | |
|---|---|--|
| 1 | 8 WEEKS OUT
Book the week | Confirm five consecutive school days. We confirm your Harvard student mentors and share the sprint rules with the school. |
| 2 | 4 WEEKS OUT
Nominate your students | 20 to 30 students from Years 10 to 13. Each sends a 60-second application video. No GPAs. We form the analyst firms of four or five. |
| 3 | DAYS 1 TO 5
The camp, on your campus | Five full days: concept, lab, live trade, deliverable. Every firm is trading a \$100,000 fund on MarketWatch by Day 1 afternoon. |
| 4 | DAYS 6 TO 20
The live sprint | Firms trade independently under the risk rules, with their mentor auditing the Trade-Reason Log. Nothing is asked of your staff. |
| 5 | GRAND FINALS
The pitch and the certificates | Each firm pitches the Investor panel for the \$1M mandate. Parents invited. Certificates and an impact summary to the head follow. |

PROGRAM FEE

USD 650

per student

THE FEE COVERS

- Harvard student mentors on site
- Mentor travel and stay
- All labs, drills and briefs
- MarketWatch fund setup
- 15-day mentored sprint
- Grand Finals panel
- Certificates for every student

BOOK A CALL

team@learnwithleaders.com

joinfinlit.com

LEARN WITH LEADERS · HPAIR · HARVARD STUDENT MENTORS

The Sovereign Capital *Challenge.*

Five days on your campus, fifteen days on live markets, and one boardroom pitch for the mandate. Real capital, real risk rules, and a track record every student can defend. Process beats luck.

BOOK THE WEEK

team@learnwithleaders.com
joinfinlit.com

DELIVERED BY



HOST SCHOOL



IN PARTNERSHIP WITH

