

miniEnterprize 2025: Stock Case

The Director of Conference of miniEnterprize 2025, in collaboration with the Director of Logistics, wrote this case study solely to provide material for the stock investment competition taking place from November 17th, 2024

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CASE STUDY:

Client Profile

After a successful internship, you have been hired as a portfolio manager at the prestigious and successful company known as miniEnterprize Asset Management Firm (mEAM). Being a freshly graduated student, you want to solidify your position within mEAM, and on November 17th, 2024, an opportunity is served to you on a silver platter– the current manager at mEAM has given you the portfolio of a woman named Sandra Liang.

Sandra is a successful beauty influencer that has amassed 500k followers on TikTok and 200k on YouTube. Using the income from her social media platforms, she is able to single-handedly provide for her parents in a three-bedroom apartment that has a monthly rent of \$3000. However in recent years, Sandra’s parents are beginning to show signs of bad health, resulting in costly medications and check-ups. Furthermore, doctors warn Sandra that her mother is showing early signs of dementia, and in the future, Sandra would most likely have to hire a full-time caregiver to watch over her father. Despite being able to afford her parent’s current medical needs, Sandra realizes that her influencer occupation is extremely unstable and volatile. She does not want to be in a dire financial situation if her father does slowly develop more severe symptoms of dementia. Thus, to plan for the long-run, Sandra is looking to invest in stable funds as a safety-net for her future needs.

Sandra’s Business Endeavours

As an influencer, Sandra mainly focuses on gaining traction and sponsorships. Since she is someone who is self-employed, she is responsible for reaching out to companies to collaborate.

In short, she often spends time conducting research and her due diligence on her sponsors, potential partners, and even on the beauty products she reviews. With these multiple revenue sources, Sandra has seen an increase in her revenue and social media following. However, Sandra believes that it is important to contribute back to the community she earned from, and to her, that can only be accomplished through taking action. Currently, Sandra is heavily involved in donating to UN humanitarian efforts around the world such as the United Nations Children's Fund (UNICEF), the United Nations High Commissioner for Refugees, and UN Women. Furthermore, Sandra actively uses her platform to raise donations for humanitarian relief causes in hopes of making a change. Thus, when investing, Sandra is looking to invest in companies that also focus on **philanthropic** efforts.

Portfolio Requirements

After a long and successful negotiation, Sandra has placed her trust in mEAM and you to responsibly manage her \$500,000 and help her invest in socially responsible companies. Her boundaries are simple: focus at least 60% of her funds on long-term investments that will generate consistent revenue growth whereas 40% can be dedicated to more risky decisions. Sandra also expects to have 35% of her portfolio invested in socially responsible companies that have a separate agenda to support philanthropic projects, whether it be focused on the environment or on human rights.

CHALLENGE

Sandra's portfolio has now been transferred to you, and you will have until December 30th, 2024 to invest Sandra's \$500,000 into whatever companies you see fit to bring a stable and safe long-term investment back. It is important to remember Sandra's expectations and goals while working on your portfolio and assessing risks. Ensure that you fulfill her request of investing at least 35% of her portfolio in socially responsible companies. The simulation has a 15-minute market delay; thus, selling within 15 minutes of buying is restricted. The margin interest rate will be 5%. There will be no late entry and no portfolio resetting.

After the challenge closes, you must submit a brief report, no more than two pages, justifying your major investment decisions and how they relate to Sandra's financial targets. The simulation has a 15-minute market delay; thus, selling within 15 minutes of buying is restricted. The margin interest rate will be 5%. There will be no portfolio resetting.

Participants must set their usernames

The winner of miniEnterprise 2025's stock trading competition will be awarded **\$300**, as determined by the following criteria.

CRITERIA

- Return rates: what was your placement in the final investment competition? (60%)
- Expectations: did you fulfill your client's expectations in your investments? (10%)
- Report: how comprehensively does your report justify your investment decisions? How and through what means (eg. DDM or ESGs) did you make your qualitative and quantitative assessments? (30%)

Key Dates

Key Dates	Events
11/17/2024	Beginning of Registration
11/24/2024	End of Registration
11/25/2024	Trading Begins
12/30/2024	Report Submission Closes, Last Day of Trading
01/11/2025	Winners are Announced during Conference

Rewards

Placement	Amount
1st Place	\$300
2nd Place	\$100
3rd Place	\$50

Contact

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