



Oklahoma Chapter 2024/2025 Portfolio Contest Rules

Contest Period: 1 June 2024 through 31 May 2025

1. Contest entries may be from BI Oklahoma Chapter clubs, or individual Oklahoma Chapter members not affiliated with an Oklahoma BI club that is submitting a portfolio entry in the contest (no “double dippers”). All entrants in the contest must be BI members throughout the contest period.
2. When submitting their entries, clubs and individuals are asked (but are not required) to provide SSGs for their stock selections and comment on their rationale for the stocks selected with a focus on BI’s investing philosophy behind their stock selections.
3. Each contest entry starts with a virtual (i.e., not cash) \$100,000 portfolio.
4. Each virtual portfolio must include a minimum of five and a maximum of ten different individual company stocks, with the initial dollar amount allocated to each equity shown on the entry form. If information about one or more stocks submitted is not obtainable via the contest's data management system (Google Finance), contestants will be requested to submit an alternate publicly available price source.
5. Entries must be submitted on the contest entry form (available by clicking [on this link](#) or in an email to contact@oklahoma.betterinvesting.net with “Portfolio Contest” in the message subject line.
6. Entries must be received by midnight, Central Time, **Friday, May 31, 2024**.
7. Only one portfolio entry form will be accepted from each club. Members of submitting clubs may participate in this fun contest as individual members but they are not eligible for the monetary award nor recognition in the individual standings.
8. The contest (with a monetary award in #14) will proceed if a minimum of 8 club entries (for the club contest) or 5 individual entries (for the individual contest) are received. If fewer than 8 club entries are received or fewer than 5 individual entries are received, the contest will go on but without a monetary award for the respective category of club or individual. The appropriate recognition of the winning entries otherwise will be the same.

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PORTFOLIO CONTEST

9. Portfolio valuations begin with closing prices on the last NYSE or NASDAQ trading day of May 31, 2024, and end with the closing prices on the last NYSE or NASDAQ trading day in May 2025 (5/30/2025).
10. The number of shares initially included or resulting from a split or spin-off will be rounded to the nearest hundredth of a share. The portfolio committee will compute the number of shares by dividing the total dollars allocated to that stock by that stock's closing price (see #9).
11. Contestants will be allowed to rebalance their portfolio one time during the contest period on a to-be-announced date, approximately mid-point during the contest (December 1, 2024). The total portfolio starting value after the reallocation will be the same value total before the rebalancing, using the same trading day close prices.
12. The winning portfolios will be based solely on stock price appreciation, including splits and spin-offs. Dividends will not be included.
13. The current holdings and value of each portfolio will be publicly available throughout the contest on the Oklahoma Chapter's web page (News & Articles section).
14. The winning club portfolio will receive \$100, and the second-place entry will receive \$75 along with other suitable public recognition. The winning individual entrant's portfolio will receive \$75, and the second-place entry will receive \$50 along with other suitable public recognition. A spokesperson for the first and second-place club portfolios will be requested to attend the chapter's Annual Meeting (EduFest) (or meeting of the Oklahoma Chapter's Board of Directors) and do a short (5 minutes) presentation covering the rationale for the stocks selected, any portfolio rebalancing, and comments on the portfolio's performance during the contest.

If you have any questions send an email to: contact@oklahoma.betterinvesting.net