

# DALLAS INVESTMENT SUMMIT

## 2025 STUDENT GUIDE

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# Competitions

## Competitive Format

### Stock Pitch Rounds

Every registered team will compete in the first round of the Stock Pitch competition consisting of their in-person submission of their report and 10 minute presentation along with a successive 5 minute Q&A from the judges. The teams will be scored on the basis of their report, presentation, and quality of their Q&A responses. The highest scoring 12 teams will advance to the semifinals to be held on the next day. It will consist of the exact same competitive process. The highest scoring five teams will advance to the finals held on the same day and will present in front of the entire competition participants and a panel of all the judges. From there, the top 3 teams will be selected and awarded.

### Case Study Rounds

Every participant will be introduced to the case study for thirty minutes (including Q&A) on Day 1 and will be given thirty minutes to meet and be introduced to their respective teams and begin the brainstorming process. The competitors will have another hour during the morning of Day 2 to develop their solutions and practice presentations. During the first round of the Case Study presentations, each team will present to judges for ten minutes with an optional visual aid (slide deck) in-person and then engage in a five minute Q&A session. They will be scored based on their presentation and Q&A. The highest scoring 5 teams will advance to the finals to be held later in the day after Stock Pitch finals. They will also present in front of the entire competition participants and a panel of all the judges. From there, the top 3 teams will be selected and announced.

### Stock Selection

Any companies selected for the Stock Pitch report and presentation must be a component of the Russell 3000 and publicly traded on an American public equities market at the report's stated date of authorship.

## Student Eligibility

Teams competing in either competitions must be actively attending high school (no younger than 14, no older than 18 on the days of the summit) and not have earned a high school diploma before the summit's end. Home-schooled students or equivalents studying to earn a G.E.D. high school diploma or equivalent are eligible to participate. Home-schooled students need not provide proof of home-school enrollment.

Teams competing in the stock pitch competition are permitted to be composed of students from different schools. Teams for the Case Study competition will be organized into teams at random and do not need to be registered individually.

## Prizes

The top three teams of the Stock Pitch competition will receive prizes of \$500 USD per student for first prize, \$250 USD per student for second prize, and \$125 per student for third prize. The Case Study competition does not offer prizes for participants.

## Ethics & Honour Code

All participants in the summit are expected to treat all other participants with respect in interactions, in-person or digitally. During the course of the summit and its related events, there is no tolerance for threatening, discriminatory, unlawful, or otherwise inappropriate behaviour, and will penalize or eliminate as consequence for any such behaviour. These expectations and regulations extend to submitted materials. The competition reserves the right to request information for reasonable investigation to protect the integrity of the competition.

The competition has good faith that all its participants will act in accordance with an unwritten code of honour and hold themselves to high professional standards. However, in any case of plagiarism, fabricated statements, any other form of deception, or obstruction of reasonable competition investigation will result in sanctions and other consequences. The competition defines reasonable investigations as prompted by undisclosed routine inspections (running reports through various AI detectors for

preliminary tests as one example), reports from other participants, or quantitative or qualitative textual analysis revealing the presence of plagiarized work. The competition recognizes the flaws in existing AI detectors and does not make judgements solely based on one-off diagnostic tests but thorough and extended investigations.

### Specific AI Policy

Students are strictly prohibited from using any Artificial Intelligence programs whether to generate ideas, find sources, write competition submissions, or presentation scripts. Unsanctioned AI use, according to the above restrictions are heavily monitored for by the competition using a variety of diagnostic tests. Students or teams found to be in violation of these policies will face immediate disqualification.

# Competitions

## Stock Pitch Report & Slide Deck

Correct Formatting:

Written Report: Single Spaced, Times New Roman, 12 Point Font, One Inch Margins on All Sides, Adherence to Page Restrictions, & Sources Cited in APA 7

\*If any formatting rule is broken, a 5% deduction will be applied to your written report score.

The Stock Pitch Report must include:

Page 1: Cover Page

Analyst Context: School Name, Date, Names of Analysts, & Emails of Analysts

Business Context: Headline, Company Name, GICS Industry, Buy/Hold/Sell Recommendation, Intrinsic Valuation/Price Target, Upside/Downside

Technical Statistics: Price of Stock on Date of Analysis, 52 Week Price Range, Last Reported Outstanding Shares Count, & Last Fiscal Year Earning Per Share

Valuation Ratios: Price-to-Earnings, Price-to-Book, & Dividend Yield

Performance Ratios: Net Margin, Debt-to-Equity, & Return on Equity

Page 2: Investment Thesis

Investment Thesis (300 words max)

Provide a high level justification for your buy/hold/sell recommendation and briefly explain your thought process going through each key reason.

Uniqueness of Thesis (300 words max)

Explain your method for discovering your company and how the method screens for outperformers.

Page 3: History and News of Business (500 words max)

Explain how your company became an independent entity (founding, merger or acquisition, spinoff). Recount key milestones and events in your company's history and their modern significance. List key current employees or partners of your company and their role in the company.

Page 4 & 5: Competitive Advantage and Key Drivers (1,000 words max)

What differentiates your company from other competitors and what advantages does that confer unto them? What major factors are affecting your business?

Page 6: Balance Sheet Analysis (500 words max)

Analyze the trends of your company's assets (short & long term), liabilities, shareholders equity, and other industry relevant balance sheet accounts in comparison to other competitors to comment on the leverage, liquidity, and capital positions.

Page 7: Income Statement Analysis and Valuation (500 words max)

Analyze trends in margins, revenue and net income growth rates, revenue and income drivers against competitors. Analyze revenue, income, projections, and valuation ratios,

Page 8: Risks and ESG (500 words max)

Explain the underlying risks of the core business and of your thesis. Furthermore, explain specific material ESG risks to the company's business.

Page 9+: Appendix and Works Cited

Appendix (Unlimited): If the analyst would like to include figures, diagrams, photos, or other visual aids but the photos do not fit in the given space along with the text, they may reference the appendix and place the visual aid in the appendix instead.

Work Cited (Unlimited): All sources used, especially those used in the writing of the report must be cited according to APA 7th edition format.

Correct Formatting:

Slide Deck: No Font or Slide Deck Length Restrictions, Includes each Written Report Section (Excluding the Appendix & Works Cited), and Accessible as a Powerpoint or Google Slides Presentation

*Note: The following is a recommended format. The presentation may be created in whichever way the competitor prefers. The summit simply wishes to offer a template to assist competitors.*

*Please understand that the following slides descriptions only include content the summit recommends each competitor to include on their slides visually and the competitor is still responsible for elaborating on each during the course of their presentation.*

*The rubric on which both the report and presentation will be judged have been provided. reference those for further questions. The summit recommends strongly that the competitor write their report first and convert it into a presentation.*

The Slide Deck's *recommended* format is:

Slide 1: Cover Page

List or otherwise indicate the analyst and business contexts' information.

Analyst Context: School Name, Date, Names of Analysts, & Emails of Analysts

Business Context: Headline, Company Name, GICS Industry, Buy/Hold/Sell

Recommendation, Intrinsic Valuation/Price Target, Upside/Downside

Slide 2: Investment Thesis

Simplified thesis restated in layman's terms clearly indicating the recommendation with key reasons bullet pointed underneath the thesis.

Slide 3: History of Business and Current Events:

Timeline with events significant to your presentation and thesis. Include a brief blurb under each event briefly describing the event and its significance to the thesis.



#### Slide 4 & 5: Competitive Advantage and Key Drivers

Diagram(s) of the company's business model or other business analysis tool (Porter 5 Forces, SWOT, PESTLE, etc.) along with bullet pointed conclusions to be elaborated on verbally.

#### Slide 6: Balance Sheet Analysis

Present a primary trend and one or two secondary trends in the company's financial position (accounts or metrics) significant to your business and your thesis. Be prepared to justify your positions.

#### Slide 7: Income Statement Analysis and Valuation

Present a primary income statement trend and a selected central valuation metric significant to your business and your thesis. Be prepared to justify your positions.

#### Slide 8: Risks and ESG

Bullet-point three to four central underlying assumptions/reliances of the core business and your thesis. Include separately two to three material ESG risks to the company's business.

# Competitions

## Stock Pitch Rubric

Stock Pitch Competition Judging Rubric					
Written Report					
Criteria	Professional	Competent	Limited	Inadequate	Score
Thesis & Uniqueness (Page 2)	Provides a defensible thesis which compares current price and intrinsic value.  Includes insight towards widely misunderstood aspects of the current situation. (9-10 pt)	Provides a defensible thesis which compares current price and intrinsic value. (6-8 pt)	Plausible thesis using only either the current price or the intrinsic value. (4-5 pt)	Provides an implausible thesis which relies on false or insignificant facts or projections, heavily on technical analysis, or relies on rumours. (0-3 pt)	/10
Industry & Business (Page 3,4,5)	Demonstrates and communicates deep understanding of the current industry and business’ competitors, competitive positions, strategies, and relevant history which supports the thesis. (9-10 pt)	Communicates adequate understanding of the current industry and business’ competitors, competitive positions, strategies, and relevant history. (6-8 pt)	Communicates the current industry situation and the business’ position within the industry but lacks depth. (4-5 pt)	Fails to communicate any understanding of the current industry situation and/or the business’ position within the industry. (0-3 pt)	/10
Valuation, Income, & Balance Sheet (Page 6,7)	Thoroughly explains key business drivers analysis by comparing specific income and balance sheet accounts against industry peers.  Supports investment thesis using DCF valuation with justification or analyzes multiple valuation metrics over time and against industry peers (5 pt)	Justifies key business drivers analysis by comparing specific income and balance sheet accounts against industry peers.  Supports investment thesis using multiple valuation metrics without analysis of the (4 pt)	Comments on financial statements and valuation but fails to analyze them.  Supports investment thesis using valuation metrics without comparison over time or against industry. (2-3 pt)	Provides and comments on income statement accounts, balance sheet accounts, and valuation ratios but fails to analyze them. (0-1 pt)	/5
Risks & ESG (Page 8)	Provides risk rating justified by describing all key thesis assumptions, their probability, and their impacts.  Provides, describes, and justifies ESG risk rating and assesses company actions to mitigate ESG threats. (5 pt)	Provides risk rating and describes some key thesis assumptions, their probability, and their impacts.  Provides and justifies ESG risk rating and describes company actions to mitigate ESG threats. (4 pt)	Provides risk rating and describes limited key thesis assumptions..  Provides ESG risk rating with limited justification and states some company actions to mitigate ESG threats. (2-3 pt)	Fails to identify thesis relevant or significant risks with no analysis of impact.  Provides ESG risk rating but does not justify the ratings or company actions. (0-1 pt)	/5
(Bonus: Creative Report)	Bonus points are equal to the number of creativity objectives met multiplied by a scale factor of 1: 1. Unique discovery method of the stock. 2. Creative research method to derive evidence when it is publicly inaccessible.				/+2
Written Report Score:					/30
Judges Notes and Comments:					

Presentation					
Criteria	Professional	Competent	Limited	Inadequate	Score
Narrative	The presentation is structured in a simple but memorable order.	The presentation is structured in a simple but memorable order.	There is an attempt to structure the presentation to be simple or memorable.	The presentation is too unstructured or complex to remember.	/20
	Each supporting point is comprehensively discussed and clearly draws back to the thesis. (15-20 pt)	Supporting points are comprehensively discussed but inconsistently draw back to the thesis. (12-14 pt)	Supporting points are shallowly discussed and fail to be drawn back to the thesis. (6-11 pt)	Each supporting point is discussed but rarely is in-depth or drawn back to the thesis. (0-5 pt)	
Professional Style	Presents all content clearly and all discussions of points flow logically. (6-7 pt)	Presents most content clearly and most discussions of points flow logically. (4-5 pt)	Presents some content clearly and most discussions of points are confusing. (2-3 pt)	Fails to provide relevant content and/or discussions are overly complex or illogical. (0-1 pt)	/7
Presentation Engagement & Techniques	Uses a clear and distinct voice, maintains calm and confident body language, without any notes. (6-7 pt)	Uses a clear and distinct voice, maintaining confident and calm body language, with limited notes. (4-5 pt)	Uses a relatively clear voice with nervous body language and/or while utilizing notes significantly. (2-3 pt)	Fails to speak clearly, speaks monotonously, fails to address judge(s), and/or reads directly from notes. (0-1 pt)	/7
Visual Aids	Each slide has an overall message and supporting points.	Each slide has an overall message and supporting points.	Too few or too many slides containing verbose or deficient text.	Too few or too many slides containing excessive or deficient text.	/7
	Graphics clarify rather than confuse. (6-7 pt)	Uses graphics but they don’t enhance understanding. (4-5 pt)	Graphics are used but are confusing. (2-3 pt)	Graphics are not present. (0-1 pt)	
Evidence, Examples, Citations	Evidence validates each point and questions of credibility or utility in timely relevance and/or authorial motives are analyzed. (6-7 pt)	Evidence sufficiently proves each point and timely relevance and/or authorial motives are cited and briefly analyzed. (5 pt)	Majority of evidence has poor credibility or relevance while timely relevance and/or authorial motives are rarely cited or analyzed. (3-4 pt)	Nearly all evidence has poor credibility or relevance while timely relevance and/or authorial motives are unmentioned. (0-2 pt)	/7
Efficiency	Presenters are able to get through the presentation deck and the allotted 10 minutes are used comprehensively filled with relevant concise information without any filler words. (7-10 pt)	Presenters are able to get through the presentation deck and the allotted 10 minutes are used comprehensively filled with relevant information with limited filler words. (5-6 pt)	Presenters are unable to get through the presentation deck and the allotted 10 minutes are filled with irrelevant with noticeable filler words. (3-4 pt)	Presenters are unable to get through the presentation deck in the allotted 10 minutes filled with irrelevant information with excessive filler words. (0-2 pt)	/10
Question & Answer	Confidently and quickly responds with justifiable reasoning and evidence. (10-12 pt)	Responds to questions in good time with justifiable reasoning and/or evidence. (7-9 pt)	Responds to questions confidently but without proper reasoning and/or evidence. (4-6 pt)	Fails to respond, dodges, or provides irrelevant answers. (0-3 pt)	/12
(Bonus: Creative Presentation)	Bonus points are equal to the number of creativity objectives met multiplied by a scale factor of 3: 1. Presentation includes non-slide deck visual aids that enhance rather than damage the presentation such as props, artifacts and more. 2. Presentation graphics go above and beyond in source, originality or production or acquisition. 3. Interactive elements of the presentation that involve the judges and/or presenter to introduce or close out the session.				/+9
Presentation Score:					/70
Judges Notes and Comments:					
Stock Pitch Total Score:					/100

# Competitions

## Case Study Presentation

Every competitor is automatically registered for both the Stock Pitch Competition and the Case Study Competition when they register for the Summit. Competitors will be randomly sorted into teams of 4 - 5 members. The case study and competitor teams will be kept confidential until the half hour introduction from 1:30 - 2:00 PM on Day 1.

The Case Study will be outlined in a two page document where every competing team will take the position of the executive management of a company considering a merger, acquisition, or a combination/series thereof. Each team is presenting their plan to the board of directors (judges) of their company for final approval of the plan. The document will feature a description of the strategic impetus or premise upon which the need for or opportunity for mergers or acquisitions has arisen and a description of the potential merger or acquisition targets' strengths and weaknesses.

Competing teams are allowed to recommend any path or combination of mergers and/or acquisition including the option not to buy any competitor and instead focus resources on an alternative strategic domain. Fabricated recommendations of combined mergers or acquisitions are limited to companies which are detailed in the case study document. Team solutions are graded based on the quality of their solution's analysis and justification and the strength of their presenting style. The teams are allowed access to any public documents or resources including resources accessed via the internet. Teams are given No slideshow is required but bonus points can be earned for an effective use or use(s) of visual aids. (See Case Study Rubric // Presentation Style: Bonus: Creative Presentation).

# Competitions

## Case Study Rubric

Case Study Competition Judging Rubric					
Presentation Content					
Criteria	Professional	Competent	Limited	Inadequate	Score
M&A Rationale & Proposals	Breaks down each key driver of the case background.  Provides an M&A plan that resolves the issues justified with material evidence. (15-20 pt)	Identifies almost all key drivers of the case background.  Provides an M&A plan that resolves the issues justified with material evidence. (12-14 pt)	Identifies some key drivers of the case background.  Attempts to resolve the issues with an M&A plan but has deficient or insufficient justification. (6-11 pt)	Presents irrelevant problems, details, ideas and/or solutions in relation to the case.  Any proposals are justified with insufficient evidence or explanation. (0-5 pt)	/20
Strategic Value	Explains the strategic value of the M&A plan by projecting the business' post-acquisition competitive positioning accounting for regulatory conditions of M&A activity. (12-15 pt)	Explains the strategic value of the M&A plan by projecting the business' post-acquisition competitive positioning without accounting for regulatory conditions of M&A activity. (8-11 pt)	Partially discusses post-acquisition competitive positioning without accounting for regulatory conditions of M&A activity. (4-7 pt)	Fails to address or denies the relevance of competitive positioning in justifying the M&A activity. (0-3 pt)	/15
Valuation, & Funding	Reasonably calculates costs of the deals using a multiple valuation method or DCF model and justifies the price and structure of the M&A deal(s) on strategic or financial grounds.  Recommends and justifies their optimization of the funding strategy. (12-15 pt)	Reasonably calculates costs of the deals using a multiple valuation method or DCF model and justifies the price of the M&A deal(s) on strategic or financial grounds.  Recommends and outlines their optimization of the funding strategy. (8-11 pt)	Unreasonably calculates the cost of the deals and attempts to justify the M&A deal(s) on qualitative grounds.  Does not mention their funding strategy. (4-7 pt)	Fails or does not attempt to calculate the cost of the deals or justify the M&A deal(s) on any grounds.  Does not mention their funding strategy. (0-3 pt)	/15
Post Acquisition Strategy	Analyzes key potential economic and cultural synergies and provides recommendations to resolve strategic differences. (8-10 pt)	Analyzes some potential economic and cultural synergies without recommendations to resolve strategic differences. (5-7 pt)	Identifies some potential economic and cultural synergies without explanation or recommendations to resolve strategic differences. (3-5 pt)	Fails to identify any potential economic and cultural synergies. (0-2 pt)	/10
Potential Risks	Identifies key strategic assumptions. Evaluates each risk's probability & the business' exposure.  Offers and justifies the mitigation strategies for significant risks. (5 pt)	Identifies some strategic assumptions. Evaluates each risk's probability & the business' exposure.  Offers and justifies specific risk mitigation strategies. (4 pt)	Identifies some strategic assumptions but does not evaluate their probabilities or the business' exposure. (2-3 pt)	Fails to identify any strategic assumptions. (0-1 pt)	/5
Presentation Content Score:					/70
Judges Notes and Comments:					

Presentation Style					
Criteria	Professional	Competent	Limited	Inadequate	Score
Professional Style	Presents all content clearly and all explanations flow logically. (8-10 pt)	Presents most content clearly and most explanations flow logically. (5-7pt)	Presents some content clearly but most explanations are confusing. (3-5 pt)	Fails to provide relevant content and explanations are overly complex or illogical. (0-2 pt)	/10
Presentation Engagement & Techniques	Uses a clear and distinct voice, maintains calm and confident body language, while using no notes to help. (8-10 pt)	Uses a clear and distinct voice, maintaining confident and calm body language, while only using a small amount of notes. (5-7pt)	Uses only a clear voice that is distinct, with slightly nervous body language, while utilizing a substantial amount of notes. (3-5 pt)	Fails to speak clearly, or speaks monotonously, does not address judge(s), and/or reads directly from notes. (0-2 pt)	/10
Question & Answer	Confidently and quickly responds with justifiable reasoning and evidence. (8-10 pt)	Responds to questions in good time with justifiable reasoning and/or evidence. (5-7pt)	Responds to questions confidently but without proper reasoning and/or evidence. (3-5 pt)	Fails to respond, dodges, or provides irrelevant answers. (0-2 pt)	/10
(Bonus: Creative Presentation)	Bonus points are equal to the number of creativity objectives met multiplied by a scale factor of 2: 1. Presentation includes visual aids that enhance rather than damage the presentation such as original props, original graphics/slide decks, artifacts and more. 2. Interactive elements of the presentation that involve the judges and/or presenter to introduce or close out the session.				/+4
Presentation Style Score:					/30
Judges Notes and Comments:					
Case Study Total Score:					/100

# Competitions

## Judges

### Judge Sourcing

Judges are professionals having either held or are currently holding an educational or working position in the finance industry sourced from a variety of firms such as financial services firms or the financial divisions of a multitude of other sectors.

### Judging Cohorts

Each round of the Stock Pitch Competition and the Case Study Competition are judged by two separate cohorts of judges. One group of judges will be assigned to the Stock Pitch Competition and the other to the Case Study Competition according to the nature of their background and expertise.

Simply by virtue of the larger three to four member teams of the Case Study compared to the one to two member teams of the Stock Pitch Competition, each presentation in the first round of the Stock Pitch Competition will be presented to a panel of one or two judges whereas the first round of the Case Study Competition will be judged by a panel of three to four judges. Every other round thereafter the first will narrow the remaining teams to the point that they will all be judged by panels of judges growing progressively larger. The final rounds of both competitions will be judged by a select panel of judges to ensure judges which grade the finalists in preliminary rounds will not judge a team twice.

### Partiality

The summit has full faith in the impartiality of the judges. Judges have been instructed to follow the rubric and provide justification for their scores to lessen the feasibility of simple bias. Furthermore, as the summit holds multiple rounds for each competition, large discrepancies in scores and rubric justifications can be carefully scrutinized and bias can easily be detected.

# Event Information

## Supplementary Videos

The Parish Episcopal School student team has created and will continue posting supplementary videos designed to assist and guide students with recommendations tailored to both equity analysis and the judging rubrics for competitors. They cover competitive registration, the summit schedule, competition rules, advice for stock selection, and writing the final equity report. The videos are available online at the Parish Business Club youtube channel:

[https://www.youtube.com/@Parish\\_Business\\_Club](https://www.youtube.com/@Parish_Business_Club)



# Event Information

## Schedule

Legend	Congregational Events	Stock Pitch Competitions	Case Study Competitions	Both Competitions
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April 12th // Day 1				
9:00 - 10:00 AM: Check-In and Networking Session				
10:00 - 10:30 AM: Opening Ceremony				
10:30 - 10:45 AM: Judges Setup and Stock Pitch Competitor Practice				
10:45 - 1:30 PM: Stock Pitch Round 1 Competition				
Group 1 (15 Teams): 10:45 - 11:00 AM				
Group 2 (15 Teams): 11:15 - 11:30 AM				
Group 3 (15 Teams): 11:15 - 11:30 AM				
Group 4 (15 Teams): 11:30 - 11:45 AM				
Group 5 (15 Teams): 11:45 - 12:00 PM				
12:00 - 12:45 PM: Lunch Break				
Group 6 (15 Teams): 12:45 - 1:00 PM				
Group 7 (15 Teams): 1:00 - 1:15 PM				
Group 8 (15 Teams): 1:15 - 1:30 PM				
1:30 PM - 2:00 PM Case Study Introduction				
2:00 PM - 2:30 PM Case Study Round 1 Preparation				
2:30 PM - 3:00 PM Stock Pitch Round 2 Announce Competitors				

## Check-In and Networking Session

Starting at 9:00 AM, summit staff in the lobby (See Appendix // Parish Episcopal School Midway Campus Map) will begin checking competitors in. Competitors will be asked to provide their full names and their schools. In the case of any technical difficulties, staff may need to view competitor receipts for their tickets so it is recommended that competitors bring a printed or virtual copy (on a mobile device) of the receipt for their ticket.

Competitors will also be given individualized schedules based on their grouping indicating the room and time that they are assigned to present their Stock Pitch Presentations to judges. Blocks shown above in aquamarine indicate presentation times for the competition based on the grouping. When not in a presenting group, competitors will have the opportunity to practice freely or partake in a simulation.

After registration, competitors can have their continental breakfast in the lobby while connecting and discussing with their peers (See Event Information // Lunch & Continental Breakfast // Continental Breakfast).

## Opening Ceremony

At 10:00 AM, competitors will be guided to the Noble (see Appendix // Parish Episcopal School Midway Map) for an opening assembly where the summit will be opened by keynote speakers and ground rules for conduct will be reiterated.

## Judges Setup and Stock Pitch Competitor Practice

From 10:30 AM - 10:45 AM, competitors will stay in the Noble and are given time to practice their Stock Pitch Presentations while judges are sent up to their rooms and set-up.

## Stock Pitch Round 1 Competition

From 10:45 AM - 1:30 PM, competitors will follow their assigned schedules, detailing the rooms they are permitted to practice in, attend simulations, or present their Stock Pitch Presentations to judges. There is a brief break in the middle from 12:00 PM - 12:45 PM for lunch.

## Lunch Break

From 12:00 PM - 12:45 PM, lunch will be provided in the Atrium. Lunch is included for all attendees as part of the tickets. For a more detailed explanation see: Event Information // Lunch & Continental Breakfast // Lunch.

## Case Study Introduction

After the Stock Pitch Round 1 Competition ends on the first day, all competitors will be directed to congregate in the Noble for a half hour introduction to the Case Study from 1:30 PM - 2:00 PM. For a more detailed explanation see: Competitions // Competitive Format // Case Study Rounds and/or Competitions // Case Study Presentation

## Case Study Round 1 Preparation

At 2:00 PM, in the Noble, the randomized Case Study teams and room assignments will also be revealed and competitors will be instructed to head to their rooms to meet and brainstorm solutions with their teams. For a more detailed explanation see: Competitions // Competitive Format // Case Study Rounds and/or Competitions // Case Study Presentation

## Stock Pitch 2 Announce Competitors

After teams have had half an hour to introduce themselves to one another and begin creating their solutions to the Case Study within their teams, they will be directed back to the Noble at 2:30 PM for the last meeting of the day where the teams advancing to the Stock Pitch Competition's Round 2 will be announced. From there, competitors are dismissed for the day.

Legend	Congregational Events	Stock Pitch Competitions	Case Study Competitions	Both Competitions
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April 13th // Day 2
9:00 - 9:30 AM: Check-In
9:30 - 9:45 AM: Judges Set-Up and Stock Pitch and Case Study Competitor Practice
9:45 - 10:15 AM: Stock Pitch Round 2 Competition
Group 1 (6 Teams): 9:45 - 10:00 AM
Group 2 (6 Teams): 10:00 - 10:15 AM
10:15 - 11:15 AM: Case Study Round 1
Group 1 (9 Teams): 10:15 - 10:30 AM
Group 2 (9 Teams): 10:30 - 10:45 AM
Group 3 (9 Teams): 10:45 - 11:00 AM
Group 4 (9 Teams): 11:00 - 11:15 AM
11:15 - 11:30 AM: Judge Decision and Processing Time
11:30 AM - 12:00 PM: Competition Finalist Announcements
12:00 PM - 12:45 PM: Lunch Break
12:45 PM - 1:30 PM Case Study Finals
1:30 PM - 2:30 PM Stock Pitch Finals
2:30 PM - 3:00 PM Awards

## Check-In

Starting at 9:00 AM, but ending at 9:30 AM this time, summit staff in the lobby will begin checking competitors in. Competitors will be asked to provide their full names and their schools. In the case of any technical difficulties, staff may need to view competitor receipts for their tickets so it is recommended that competitors bring a printed or virtual copy (on a mobile device) of the receipt for their ticket.

Competitors will also be given individualized schedules depending on whether or not they advanced to the second round of the Stock Pitch Competition. There will be no simulations on Day 2.

## Judges Setup and Stock Pitch Competitor Practice

From 9:30 AM - 9:45 AM, competitors will stay in the Noble and those in the second round of the Stock Pitch Competition are given time to practice their Stock Pitch Presentations while judges are sent up to their rooms and set-up. All others will use the time to prepare their Case Study solutions.

## Stock Pitch Round 2 Competition

From 9:45 AM - 10:15 AM, competitors in Stock Pitch Round 2 will follow their assigned schedules to present to new judges in their assigned rooms at their assigned times. All others will stay in the Noble and be assigned spaces to meet their respective Case Study teams to prepare for the Case Study Presentation.

## Case Study Round 1 Competition

From 10:15 AM - 11:15 AM, all competitors will follow their assigned schedules, detailing the rooms they are permitted to practice in, or present their Stock Pitch Presentations to judges. All free blocks can be used for continued practice in the Noble.

## Judge Decision and Processing Time

Judges will require extra time from 11:15 AM - 11:30 AM to process the Case Study and Stock Pitch Rounds due to the lack of a large gap between the competition times and the announcement times. Competitors will be called back to the Noble to await announcements.

## Competition Finalist Announcements

From 11:30 AM - 12:00 PM, Case Study and Stock Pitch Finalist Teams will be announced in the Noble. All teams will be directed back to the Noble at 2:30 PM.

## Lunch Break

From 12:00 PM - 12:45 PM, lunch will be provided in the Atrium. Lunch is once again included for all attendees as part of the tickets. For a more detailed explanation see: Event Information // Lunch & Continental Breakfast // Lunch.

## Case Study Finals

From 12:45 PM - 1:30 PM, all competitors will be called to the Noble to observe the Case Study Finals and then the Stock Pitch Finals. Finalist teams will be called down to the stage one at a time within the same time limits as before to make their presentations to the entire summit.

## Stock Pitch Finals

From 1:30 PM - 2:30 PM, the Stock Pitch Finals will follow the Case Study Finals. Finalist teams will be called down to the stage one at a time within the same time limits as before to make their presentations to the entire summit.

## Awards

At 2:30 PM, the finalists' scores will be tallied and the top three for each category determined. Winners will be announced and called down to the stage to receive their cash prizes and awards. All competitors are thereafter dismissed.

# Event Information

## Lunch & Continental Breakfast

### Continental Breakfast

A Continental Breakfast is provided on Day 1 in Parish's lobby as complementary to the net-working session, occurring during the "Check-In and Networking Session" from 9:00 AM - 10:00 AM. The Continental Breakfast comes with the ticket and includes some toast & jam, coffee or water, and some fruit cups. The Continental Breakfast is also on offer for school advisors supervising students in the summit.

### Lunch

Lunch is provided on both Day 1 and Day 2 in Parish's atrium with a separate block (12:00 PM - 12:45 PM) carved out for all participants to break. Lunch on both days comes with the ticket, and is ordered according to the lunch selection made on the ticket form. (See Event Information // Registration Process // Step 4 // a. Competitor's Information // vii. Preferred Lunch Selection ). The lunch selections are from Jersey Mike's except for the vegetarian option which is from Domino's.

The Lunch options are:

- Provolone and Ham Sandwich on White Bread
- Turkey and Provolone Sandwich on White Bread
- Tuna Fish Sandwich on White Bread
- Bacon Lettuce Tomato + Mayo Sandwich on White Bread
- Swiss Provolone and Green Bell Pepper Sandwich on White Bread
- Tomato Onion Carrot Cabbage on Lettuce Salad

# Event Information

## Registration Process

Registration lasts until February 28th 11:59 Central Standard Time.

To register, please navigate to the online registration portal at:

<https://www.dallasinvestmentsummit.com>

Please understand that a ticket grants entrance for the competitor, their parents, and any school advisors to the event and that each ticket has a \$45 USD admissions fee.

Registration Steps:

1. The website's home page will include a button labeled 'TICKETS'. Alternatively, you may navigate to the same location by clicking on the 'Tickets & Schedule' page in the top left-hand tab group.
2. Once arriving on the 'Tickets & Schedule' page, scroll down to find the button labeled 'TICKETS'. Click on that button.
3. Clicking on the 'TICKETS' button will open up a new tab in your browser, the ticket information and payment form.
4. Fill out the required information in the ticket form. This includes:
  - a. Competitor's Information:
    - i. Competitor's First and Last Name - The competitor's preferred first and last names.
    - ii. Competitor's Email Address - The competitor's email address of choice, preferably one that the competitor frequents, and one which they are comfortable receiving communications from the summit's team.
    - iii. Competitor's High School - The high school the competitor is currently attending. Home schoolers, which have been defined earlier in the guide under 'Competitions // Competitive Format // Student Eligibility', may simply and clearly state, "Home-Schooled" or some other similarly meaning equivalent. No proof of current attendance is required though sanctions will be applied in



accordance with the summit's Ethics & Honour Code (See Competitions // Competitive Format // Ethics & Honour Code) should Student Eligibility be breached or other dishonesty is found in competitor's information.

- iv. Competitor's Current Grade Level - The competitor's American grade level or international equivalent that they will be classified in as of the summit's date (April 12th-13th, 2025).
- v. Parent/Legal Guardian's First & Last Name - The first and last names of one of the legal parents or guardians of the competing student. This information will be kept confidential and used only for emergency or other significant communications.
- vi. Parent/Legal Guardian's Email Address & Phone Number - The preferred email address and preferred phone number of the legal parent or guardian of the competing student. Please select a frequented email and phone number that the parent or guardian is comfortable with receiving communications from the summit. (Note this must be the email and phone number of the parent whose first and last name were given earlier.) This information will also be kept confidential and used only for emergency or other significant communications.
- vii. Preferred Lunch Selection for Both Days - As lunch is supplied for both days, please indicate using the multiple choice boxes, which lunch option you prefer. The list is comprehensive, detailed, and includes a vegetarian option.
- viii. Disciplinary History - This requirement asks competitors to assure that they have not been expelled from any accredited institution during their primary or secondary education. If they have, and still would like to attend, please contact the summit with a letter of recommendation from a licensed teacher having taught the student at an accredited institution within the last two years and the student will be permitted to attend.
- ix. Conduct - This required checkbox serves as a guarantee from the competitor and their guardians that the competitor will conduct

themselves legally and respectfully and adhere to Parish Episcopal School staff's instructions within reason.

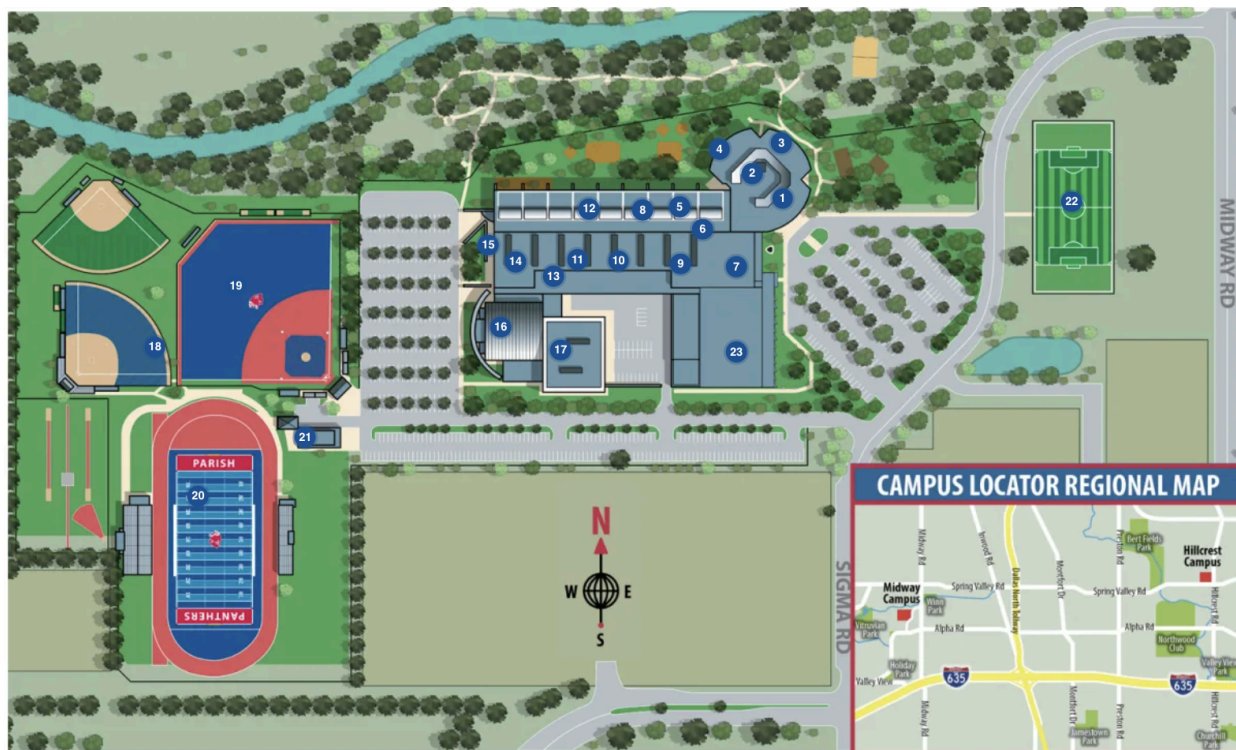
b. Payment Information

- i. Email Address - Please provide an email address where the ticket's receipt will be emailed. This email is not required to be the same as the ones previously provided.
- ii. Payment Type - Only credit card payments are available and accepted on the website. However, the summit is amenable to different payment methods as options of last resort. Please reach out to the summit to conduct such an activity and understand that such a method would be more complicated than the preferred method.
- iii. Billing Address, Address, City, State/Province, Country, Zip Code, Cardholder Name, Card Number, CVV Number, & Expiration Date - This is standard practice for online credit card transactions. Please fill in this section legally and precisely to avoid future complications. We reiterate that the admissions fee is \$45 USD.

5. You're registered! The summit's record will allow us to check you in at the summit if you simply provide your name and school. A receipt of payment has been sent to the email address that you provided for the ticket. The summit prefers if you can access this ticket during the summit in case of technical difficulties.

# Appendix

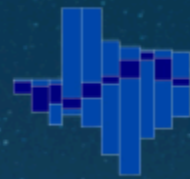
## Parish Episcopal School Midway Map



### Legend

- |  |  |  |   |
|--|--|--|---|
| <a href="#"><u>1 Main Lobby</u></a>                            | <a href="#"><u>7 PAWS Spirit Store</u></a>         | <a href="#"><u>13 Science Classrooms</u></a>                         | <a href="#"><u>18 Whitaker Field at Tadewald Park</u></a>     |
| <a href="#"><u>2 Kleinert Commons / Atrium / Cafeteria</u></a> | <a href="#"><u>8 Design Den</u></a>                | <a href="#"><u>14 Arts Classrooms</u></a>                            | <a href="#"><u>19 Carter Field at Fleezer Stadium</u></a>     |
| <a href="#"><u>3 Pearlman Conference Center</u></a>            | <a href="#"><u>9 3rd &amp; 4th Grades</u></a>      | <a href="#"><u>15 Margaret Jonsson Family Foundation Gallery</u></a> | <a href="#"><u>20 Gloria H. Snyder Stadium</u></a>            |
| <a href="#"><u>4 Middle &amp; Upper Classes</u></a>            | <a href="#"><u>10 Godwin Chapel</u></a>            | <a href="#"><u>16 Panther Gym &amp; Morris Family Lobby</u></a>      | <a href="#"><u>21 Ed's Snack Shack</u></a>                    |
| <a href="#"><u>5 Main Library</u></a>                          | <a href="#"><u>11 Black Box Theater</u></a>        | <a href="#"><u>17 Gene E. Phillips Activity Center</u></a>           | <a href="#"><u>22 Practice Fields</u></a>                     |
| <a href="#"><u>6 Amanda Havard Library</u></a>                 | <a href="#"><u>12 Middle School Classrooms</u></a> |  | <a href="#"><u>23 Noble Family Performing Arts Center</u></a> |

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