

# TUTORIAL

# CREATE NEW SESSION

# PROFESSOR ACCOUNT

Register for your free account on StockTrak.com, or  
Login with your professor account.

Help ▾ Blog Select Language ▾

Forgot Password?

Login →

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## Stock Market Simulations & Financial Literacy Games for Students & Adults

- Customizable stock and investing games
- Interactive budgeting and money games
- Embedded financial literacy lessons
- College, K12 and corporate solutions

I want to register as a:

Professor

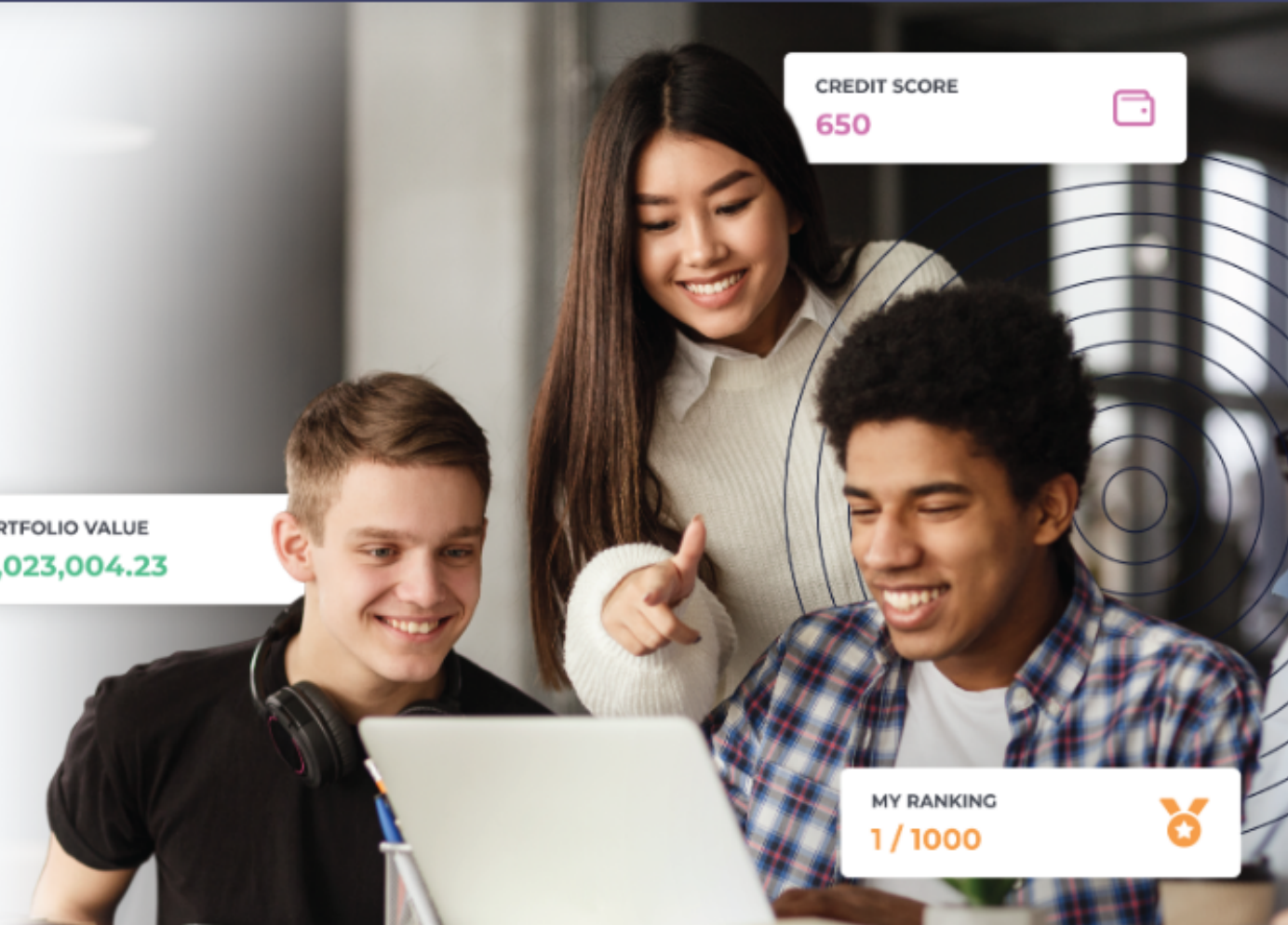
Student

Individual

PORTFOLIO VALUE  
\$1,023,004.23

CREDIT SCORE  
650

MY RANKING  
1 / 1000



# PROFESSOR REGISTRATION

Click, Register and select Professor.

Help ▾ Blog Select Language ▾

Forgot Password? Login →

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## Stock Market Simulations & Financial Literacy Games for Students & Adults

- Customizable stock and investing games
- Interactive budgeting and money games
- Embedded financial literacy lessons
- College, K12 and corporate solutions

I want to register as a:

Professor

Student

Individual

Professor

Student

Investor

PORTFOLIO VALUE  
\$1,023,004.23

MY RANKING  
1 / 1000



# PROFESSOR REGISTRATION

Fill-out the form, click **Next** at the bottom of the page.

## Professor Registration

✕ Account Details

✕ Confirmation

Professors must register as a professor on the site. Professors login, and from the Admin menu select "Register New Class". When registering their new class, professors customize the trading by selecting the trading dates, initial cash balance, currency of the account, commission structure, diversification rules, and eligible securities and exchanges. Professors then distribute a link to their students and the students register for that professor's class by clicking on that link.

### Account Information

USERNAME •

PASSWORD •

CONFIRM PASSWORD •

# PROFESSOR REGISTRATION

Click, **Create New Session**.

## Professor Registration

✓ Account Details

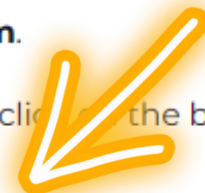
✓ Confirmation

### Your user account has been successfully created!

Your Stock-Trak profile has been created with the information below. Please review it carefully. You will be able to edit this information at any time in the future. Your registration information has also been sent to your email **cwood@stocktrak.com**.

In order to get started, click the button below.

Create New Session



# CREATE NEW SESSION

Go to **Admin** on the Main Menu,  
Click **Create a New Session**.

The screenshot displays the StockTrak user interface. At the top, there is a dark blue navigation bar with the following elements: 'Help' and 'Select Language' on the left; 'Welcome back, cwood66' and a notification icon with the number '1' in the center; 'Hector's Class' in an orange box on the right; and 'Logout' with a right-pointing arrow on the far right. Below this is a secondary dark blue menu with 'Dashboard', 'Portfolio Simulation', 'Investing Research', 'Learning', 'Admin', and 'Reports', each followed by a downward arrow. The 'Admin' menu item is highlighted with a yellow arrow pointing to it from the right. Below the navigation bar, the main content area is divided into three columns. The first column, titled 'MY SESSIONS', contains 'Create A New Session' and 'Edit Portfolio Simulation Rules'. A yellow arrow points to 'Create A New Session'. The second column, titled 'ASSIGNMENTS', contains 'Create A New Assignment', 'View My Assignments', and 'Edit Assignments'. The third column, titled 'ADMIN RESOURCES', contains 'Guides and Tutorials', 'Registration File/Password Resets', 'Manage Teams', and 'Make A Payment'. Below the main content area, there is a light blue section with an 'Admin Message' header and a message stating 'You currently have no announcements posted...' with a 'Post An Announcement' button. On the right side, there is a sidebar with an 'UPLOAD LOGO' button, an 'Upload Document' button, and a link to 'view previously uploaded'. At the bottom of the sidebar, under the heading 'Administration', there are two links: '→ Register New Class' and '→ Edit Existing Class'.

# UNLIMITED CLASSES!

Toggle between classes by clicking the **orange button** on the top menu.



## Create New Session

- Service Level**
- Session Details
- Budget Game
- Portfolio Settings
- Trading Settings
- Assignment
- Confirmation

**Tell us the subject you are teaching.** There are dozens of security types, trading activities, videos, and quizzes available for your session, this will help narrow it down to what your session needs are. If you don't see a subject that matches what you teach, pick the closest available and leave us a comment in the last step.

**SUBJECT**

Personal Finance ▾

OR

Copy Previous Session

**ACADEMIC LEVEL**

None ▾

**AUTHOR OF TEXTBOOK**

None ▾

### Need Help?

Reach us at **1-800-786-8725** or **1-514-871-2222**

You can use the live chat at the bottom of this page, or leave a message if outside our normal office hours.

# SERVICE LEVEL OPTIONS

To get access to the Budgeting Game, select **Personal Finance**.

Click **Investments** or **Portfolio Management** to access all securities and exchanges.

## Create New Session

× Service Level

× Session Details

× Budget Game

× Portfolio Settings

× Trading Settings

× Assignment

× Confirmation

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SUBJECT ▾

Personal Finance ▾

OR

Copy Previous Session

ACADEMIC LEVEL ▾

None ▾

AUTHOR OF TEXTBOOK ▾

None ▾

### Need Help?

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# TEXTBOOK PROMO CODE

Select the author name from the dropdown menu.

### Create New Session

- Service Level
- Session Details
- Budget Game
- Portfolio Settings
- Trading Settings
- Assignment
- Confirmation

Tell us what you need for this session. Select from the list of available textbooks.

OR

dozens of security types, trading activities, videos, and quizzes available for your session, and you can select from a list of textbooks that meet your needs. If you don't see a subject that matches what you teach, pick the closest one to your subject.

**Need Help?**  
Reach us at **1-800-786-8725** or **1-514-871-2222**  
You can use the live chat at the bottom of this page, or leave a message if outside our normal office hours.

- Madura (Personal Finance)
  - Malkiel
  - Mayo (Basic Investments)
  - Mayo (Investments)
  - McGraw Hill Asia**
  - McGraw Hill India
  - Mishkin
  - Mishkin (Economics)
  - Nichols/McHugh/McHugh
  - O'Neil, William
  - Other
  - Parrino, Kidwell, Bates
  - Reilly/Brown
  - Reilly/Norton
  - Ross (Fundamentals)
  - Shapiro
  - Smart/Gitman/Joehnk (Fundamentals)
  - Solnik/McLeavey
  - Strong (Portfolio Construction)
  - Strong (Practical Invest Mgt)
- None ▾

# SESSION DETAILS

Enter the Session Name and Dates.

## Payment Options

- Instructors
- Students

### Create New Session

✓ Service Level

✓ Session Details

✗ Portfolio Settings

✗ Trading Settings

✗ Assignment

✗ Confirmation

Please enter your session name, dates and preferred set-up to continue.

SESSION NAME • ⓘ

Fall2024PortfolioManagement

REG START DATE • ⓘ

08/21/2023

REG END DATE • ⓘ

10/13/2023

START DATE • ⓘ

08/28/2023

END DATE • ⓘ

12/15/2023

NUMBER OF STUDENTS IN CLASS • ⓘ

40

TIME ZONE • ⓘ

(GMT-05:00) Eastern Time (US ... ▾

ENABLE FORUM • ⓘ

Yes  No

PAYMENT METHOD • ⓘ

Students  Instructor

*Students will pay individually during student registration*

INCLUDE PORTFOLIO SIMULATION



# PORTFOLIO SETTINGS

Click next if you want to keep the Default Recommended Settings.

Click **Customize Settings** to change these settings.

### Create New Session

- ✓ Service Level
- ✓ Session Details
- ✗ Portfolio Settings**
- ✗ Trading Settings
- ✗ Assignment
- ✗ Confirmation

Next, we will choose the settings for your class portfolio simulation.

ENABLE PORTFOLIO SIMULATION

#### Default Recommended Settings

- Starting cash of **\$1,000,000** in US Dollars
- **\$3 minimum** stock price
- Allowing short selling, day trading, and trading on margin
- Charging **8% interest** on any loan amounts when trading on margin
- Enabling specialized rankings by Sharpe Ratio and Jensen's Alpha
- Setting a **risk-free rate of 3%** (uninvested cash earns a 3% risk-free return)
- Everyone will need a note every time they trade explaining their rationale
- Your administrator account will not appear in the class rankings

[← Back](#) [Customize Settings](#) [Next →](#)

# TRADING SETTINGS

Choose from:

- Equities
- Stocks
- ETFs
- Cryptos
- Mutual funds
- Bonds
- Options
- Futures
- Future Options
- Forex
- Cash Spots

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**Equities**

Stocks  ETFs

**COMMISSION** •

**POSITION LIMIT %** •   
*This Is The Maximum Amount A Student Can Invest In A Single Security. (Example: Max They Can Invest In AAPL)*

**DIVERSIFICATION %** •   
*This Is The Maximum Amount A Student Can Invest In The Entire Asset Class. (Example: Max They Can Invest In Equities)*

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**Cryptos**

**COMMISSION** •

**POSITION LIMIT %** •  ▼  
*This Is The Maximum Amount A Student Can Invest In A Single Security. (Example: Max They Can Invest In BTC)*

**DIVERSIFICATION %** •  ▼  
*This Is The Maximum Amount A Student Can Invest In The Entire Asset Class. (Example: Max They Can Invest In Crypto)*

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**Mutual Funds**

**COMMISSION** •

**POSITION LIMIT %** •  ▼  
*This Is The Maximum Amount A Student Can Invest In A Single Security. (Example: Max They Can Invest In The Fidelity Magellan Fund)*

**DIVERSIFICATION %** •  ▼  
*This Is The Maximum Amount A Student Can Invest In The Entire Asset Class. (Example: Max They Can Invest In Mutual Funds)*

# ASSIGNMENTS

You can skip this step by clicking the **Skip This Step** button.

**Please Note:** we have a video and guide dedicated to setting up Assignments.

## Include:

- Reading Articles
- Watching Tutorial Videos
- Completing Tasks

### Create New Session

- ✓ Service Level
- ✓ Session Details
- ✓ Portfolio Settings
- ✓ Trading Settings
- ✗ **Assignment**
- ✗ Confirmation

**Create an assignment for your class.** This is a list of tasks you can give your students to help them get started with their portfolio or learn more about personal finance and investing topics.

You can create multiple assignments for your session, many professors will create one per week, month, or one large assignment covering the entire semester. Tasks include articles (ending in quizzes), tutorial videos (showing students how to manage their portfolio) and making certain types of trades. Learn more about assignments.

**Skip This Step**

\* ASSIGNMENTS CAN BE CREATED AT ANY TIME DURING YOUR SESSION.

NAME	START/END DATES	PREREQUISITE ⓘ	REWARD ⓘ	
Beginner Lessons	08/28/2023 00:...	12/15/2023 00:00	None	None

**0 MINS** Copy Older Assignment

# ASSIGNMENTS

Require Specific Trades:

- Security Types
- Exchanges
- Order Types

## Investing Actions - Basic Trades

REQUIRE?	ACTION	HOW MANY TIMES?	ALLOW RETRIES?
<a href="#">SELECT ALL TASKS</a>   <a href="#">SELECT NONE</a>		<a href="#">SELECT ALL RETRIES</a>   <a href="#">SELECT NONE</a>	
<input checked="" type="checkbox"/>	Trading - Buy or Sell Stocks/ETFs <a href="#">View</a>	10	<input type="checkbox"/>
<input type="checkbox"/>	Trading - Buy or Sell Mutual Funds <a href="#">View</a>	5	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Trading - Buy or Sell Corporate Bonds <a href="#">View</a>	3	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Trading - Buy or Sell Treasury Bonds <a href="#">View</a>	3	<input type="checkbox"/>
<input type="checkbox"/>	Trading - Short a Stock or ETF <a href="#">View</a>	3	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Trading - Use a Limit Order <a href="#">View</a>	1	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Trading - Use a Stop Order <a href="#">View</a>	1	<input type="checkbox"/>
<input type="checkbox"/>	Trading - Use a Trailing Stop Order <a href="#">View</a>	1	<input type="checkbox"/>
<input type="checkbox"/>	Trading - Use a Market Order <a href="#">View</a>	1	<input type="checkbox"/>
<input type="checkbox"/>	Trading - Total Trades <a href="#">View</a>	15	<input type="checkbox"/>

# CONFIRMATION

Share the registration link with your students so they can join your session.

## Create New Session

✓ Service Level

✓ Session Details

✓ Portfolio Settings

✓ Trading Settings

✓ Assignment

✓ Confirmation

### Congratulations, Professor Cassandra Wood!

**Your class code "Fall2024PortfolioManagement" has now been successfully created!**

You can optionally create up to 2 "demo" student accounts that will appear in your class rankings. These can be used to set up "benchmark" portfolios.

1 demo account ▾

**Get Accounts**

Your students can now register. You have been emailed a copy of this page.

### To Register Your Students

Please forward this link to your students to automatically direct them to the registration page of your class.

<https://www.stocktrak.com/members/register?session=Fall2024PortfolioManagement>





**STILL NEED ASSISTANCE?**

**CONTACT SUPPORT**

**SUPPORT@STOCKTRAK.COM**