

STOCK|TRAK
GLOBAL PORTFOLIO SIMULATIONS



TUTORIAL MANAGING CLASS

STOCK|TRAK HOW-TO GUIDES

EDIT YOUR SESSION

Manage your class/session from the Admin tab on the main menu.
Click **Edit Trading Rules** to make any changes.

Help ▾ Select Language ▾

Welcome back, **cwood66**



Fall2024PortfolioManagement ▾

Logout →



Dashboard ▾ Portfolio Simulation ▾ Investing Research ▾ Learning ▾ Admin ▾ Reports ▾

MY SESSIONS

- Create A New Session
- Edit Portfolio Simulation Rules

ASSIGNMENTS

- Create A New Assignment
- View My Assignments
- Edit Assignments

ADMIN RESOURCES

- Guides and Tutorials
- Registration File/Password Resets
- Manage Teams
- Make A Payment



Admin Message

You currently have no announcements posted...

Post An Announcement

UPLOAD LOGO

Upload Document

[view previously uploaded](#)

Administration

CONTACT OUR HELPDESK

Contact our Helpdesk to update:

- Initial Cash
- Trading End Date
- Allow/Disallow Margin Trading

Contact Info:

- **Live Chat** 9AM to 5PM EST
- **Email** support@StockTrak.com
- **Call** 1-514-871-2222

The screenshot displays the 'EDIT CLASS' interface for the 'Fall2024PortfolioManagement' class. The interface includes a toggle for 'Include Portfolio Simulation' (currently off), input fields for '* Minimum Stock Price for Buying' (3), '* Minimum Stock Price for Shorting' (3), and '* Weekly Deposit' (0). Below these are radio button options for '* Display Sharpe Ratio Rankings?', '* Display Treynor Rankings?', '* Display Jensen's Alpha Rankings?', '* Allow Short Selling?', and '* Allow Day Trading?', all of which are currently set to 'YES'.

On the right side, there is a 'ST-Support' chat widget. It features a blue header with a building icon, the text 'ST-Support', and a message: 'We are here to help you! Call or chat to connect with us right away.' At the bottom of the widget are two buttons: 'Call' and 'Chat'.

ADMIN MENU

My Sessions:

Create/edit sessions

Assignments:

Create/edit/view assignments

Admin Resources:

Tutorial guides, manage students & teams

Help ▾ Select Language ▾

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Administration

MANAGE TEAMS

Group students into teams to see their combined portfolios on the ranking page. You'll need to login with the **team name** and **password** provided to view team holdings.

Help ▾ Select Language ▾ Welcome back, cwood66 1 Fall2024PortfolioManagement ▾ Logout →

STOCK|TRAK FINANCE. EDUCATION. GAMIFIED. Dashboard ▾ Portfolio Simulation ▾ Investing Research ▾ Learning ▾ Admin ▾ Reports ▾

DOW JONES 0.20% ^ 0.68 **S&P500** 0.35% ^ 1.56 **NASDAQ** 0.93% ^ 3.54 **CRUDE OIL** -1.32% v -0.89 **BRENT OIL** -1.59% v -0.43 **NAT GAS** -0.30% v -0.02

PORTFOLIO VALUE \$1,000,000.00 **PORTFOLIO RETURN** 0.00% **CASH BALANCE** \$1,000,000.00 **BUYING POWER** \$2,000,000.00 **MY RANKING** 0 / 5 **CHALLENGE END DATE** 150 DAYS

Manage Teams ⓘ

VIEW REPORT










Manage Teams ▾

+ Add New Team

Users Without Teams

NAME	USERNAME	
Pro Tutorial	pro_tutorial24	Add To Team... ▾
Pro Tutorial	pro_tutorial25	Add To Team... coyotes24 coyotes25 coyotes26
Pro Tutorial	pro_tutorial26	Add To Team... ▾

Active Teams

TEAM NAME	PASSWORD	# OF MEMBERS	
coyotes24	82d7d9	1	  
coyotes25	e68b6e	0	  
coyotes26	96d6fa	0	  


DASHBOARD FEATURES

Click **Return to Dashboard** under the **Dashboard** tab on the main menu to get back to your Admin Dashboard. From here you can post announcements, upload documents and get a quick overview of student progress.


The screenshot displays the StockTrak Admin Dashboard interface. At the top, there is a dark navigation bar with the following elements: 'Help' and 'Select Language' (both with dropdown arrows), a user greeting 'Welcome back, cwood66' next to a notification icon with a red '1', a dropdown menu for 'Fall2024PortfolioManagement', and a 'Logout' button with a right-pointing arrow. Below this is a secondary dark menu with tabs: 'Dashboard' (highlighted with a yellow arrow), 'Portfolio Simulation', 'Investing Research', 'Learning', 'Admin', and 'Reports'. The main content area is divided into several sections. On the left, there is a 'Return To Dashboard' button with a left-pointing arrow, highlighted with a yellow arrow. In the center, there are two columns of options: 'MY PROFILE' (with sub-options 'Edit Profile' and 'My Achievements') and 'DOCUMENTS' (with sub-option 'View Uploaded Documents'), both highlighted with yellow arrows. On the right side, there is an 'UPLOAD LOGO' button and a section for document uploads, which includes an 'Upload Document' button and a link for 'view previously uploaded', both highlighted with a purple oval. At the bottom left, there is an 'Admin Message' section with a message icon, a status 'You currently have no announcements posted..', and a 'Post An Announcement' button, all highlighted with a purple oval. At the bottom right, there is an 'Administration' section with links for 'Register New Class' and 'Edit Existing Class'.


USER RANKINGS WIDGET







Click the **eye icon** to view that student's portfolio information.

 **Admin Message**

MESSAGE ACTIONS

 Please complete your first trades before the end of your first week of class. [Edit Message](#)

 **User Rankings** [View More Reports](#)

RANK	USERNAME	NAME	PORTFOLIO VALUE	ACTIONS
1	 pro_tutorial24	pro_tutorial24 Pro	1,000,072.00	
2	 pro_tutorial25	pro_tutorial25 Pro	1,000,000.00	
3	 pro_tutorial26	pro_tutorial26 Pro	1,000,000.00	



REPORTS MENU

Use the **Reports** menu for more detailed information about student activity. Choose from one of the premade reports, or create your own with the **Custom Reports**.

Help ▾ Select Language ▾

Welcome back, cwood66



Fall2024PortfolioManagement ▾

Logout →



Dashboard ▾ Portfolio Simulation ▾ Investing Research ▾ Learning ▾ Admin ▾ Reports ▾

SESSION

Summary Report
Registration File

CUSTOM REPORTS

Create Custom Report
View Custom Reports

PORTFOLIO SIMULATION

Ranking Report
User Summary Report
Activity Report
Diversification Report
Top Traded Securities
Full Session Portfolio Exports

ASSIGNMENTS

Assignment Student Progress Report
Assignment Class Progress Reports
Manage Assignments



To get your users registered into this session, please send them this link: <https://www.stocktrak.com/members/register?session=Fall2024PortfolioManagement>

ADD EXTRA USER TO CLASS

USERNAME PREFIX:

i.e. student-

LOGINS NEEDED:

1

Add

Message to All Users

This section allows you to view all the information captured on the registration page for your students/users.

USERNAME	EMAIL	NAME	SECONDARY NAME	SECONDARY EMAIL	ACCOUNT CREATE DATE	IS TA?	ACTIONS
----------	-------	------	----------------	-----------------	---------------------	--------	---------

SUMMARY REPORT

Your class **registration link** is at the bottom of this report.

Admin Reports

VIEW REPORT

Summary Report



Print



Export To Excel

Fall2024PortfolioManagement

This section give you a summary of your **class activity** and **parameters**.

Trading Session Name	Fall2024PortfolioManagement
Start Date	6/28/2023 9:30:00 AM
End Date	12/15/2023 4:00:00 PM
Beginning Cash	1000000
Security Types	EQ,CRYPTO,MF,BONDS,OPTIONS,FUTURES,FOPTIONS,SPOTS,CASH SPOTS
Exchanges	US, T, SA, MX, AR, CL, AE, XATH, BT, XBUD, CO, FF, HI, IE, LB, LN, FR, XPRA, ST, SM, VI, SPA, NOR, MOS, HK, KL, NZ, KS, SS, SZ, BO, PK, XIDX, XBKK, AX, TW, XTAE, HSTC, XBOT, XGHA, XNAI, V
Total Registrations	8
Investing Activations	1
Total Trades Made	3
Invite Link	https://www.stocktrak.com/members/register?session=Fall2024PortfolioManagement






REGISTRATION FILE

View all the students who have registered to your class.

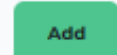
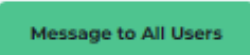
Grant your TA special permission to pull reports, and view student activity.

TA accounts are NOT able to edit class settings.

Admin Reports








VIEW REPORT: **Registration File** FILTER: Username...   Print  Export To Excel [Fall2024PortfolioManag](#)

To get your users registered into this session, please send them this link: <https://www.stocktrak.com/members/register?session=Fall2024P>

ADD EXTRA USER TO CLASS USERNAME PREFIX: # LOGINS NEEDED:  

This section allows you to view all the information captured on the registration page for your students/users.

Sort By:

USERNAME	EMAIL	NAME	SECONDARY NAME	SECONDARY EMAIL	ACCOUNT CREATE DATE	IS TA?	ACTIONS
pro_tutorial26	cwood@stocktrak.com	Pro Tutorial			7/18/2023 6:27:16 AM	Yes	
pro_tutorial25	cwood@stocktrak.com	Pro Tutorial			7/18/2023 6:27:16 AM	No	
pro_tutorial24	cwood@stocktrak.com	Pro Tutorial			7/18/2023 6:26:17 AM	No	
cwood66	cwood@stocktrak.com	Cassandra Wood			7/17/2023 3:24:22 PM	No	---
coyotes27	fake@fake.com	---	---		7/18/2023 12:18:27 PM	No	
coyotes26	fake@fake.com	---	---		7/18/2023 6:30:15 AM	No	
coyotes25	fake@fake.com	---	---		7/18/2023 6:30:06 AM	No	
coyotes24	fake@fake.com	---	---		7/18/2023 6:19:48 AM	No	

RANKING REPORT

The Ranking Report is updated at midnight each evening, so it does not reflect real-time values.

Admin Reports

VIEW REPORT

Rankings

TYPE

Overall

Print

Export To Excel

Fall2024PortfolioManagement

This section allows you to view the standings for the students or users and explore their accounts in more detail.

This rank file is updated at midnight each evening and does not reflect real-time values.

USER	PORTFOLIO VALUE	% RETURN	SHARPE RATIO	ALPHA	BETA	# TRADES	ACTIONS			
o_tutorial25	\$1,000,000.00	0.00	0.00	0.00%	0.00	0	Portfolio	Cash Adjustment	View Chart	Reset Portfolio
o_tutorial26	\$1,000,000.00	0.00	0.00	0.00%	0.00	0	Portfolio	Cash Adjustment	View Chart	Reset Portfolio

USER SUMMARY REPORT

SESSION

Summary Report

Registration File

CUSTOM REPORTS

Create Custom Report

View Custom Reports

PORTFOLIO SIMULATION

Ranking Report

User Summary Report

Activity Report

Diversification Report

Top Traded Securities

Full Session Portfolio Exports

ASSIGNMENTS

Assignment Student Progress Report

Assignment Class Progress Reports

Manage Assignments

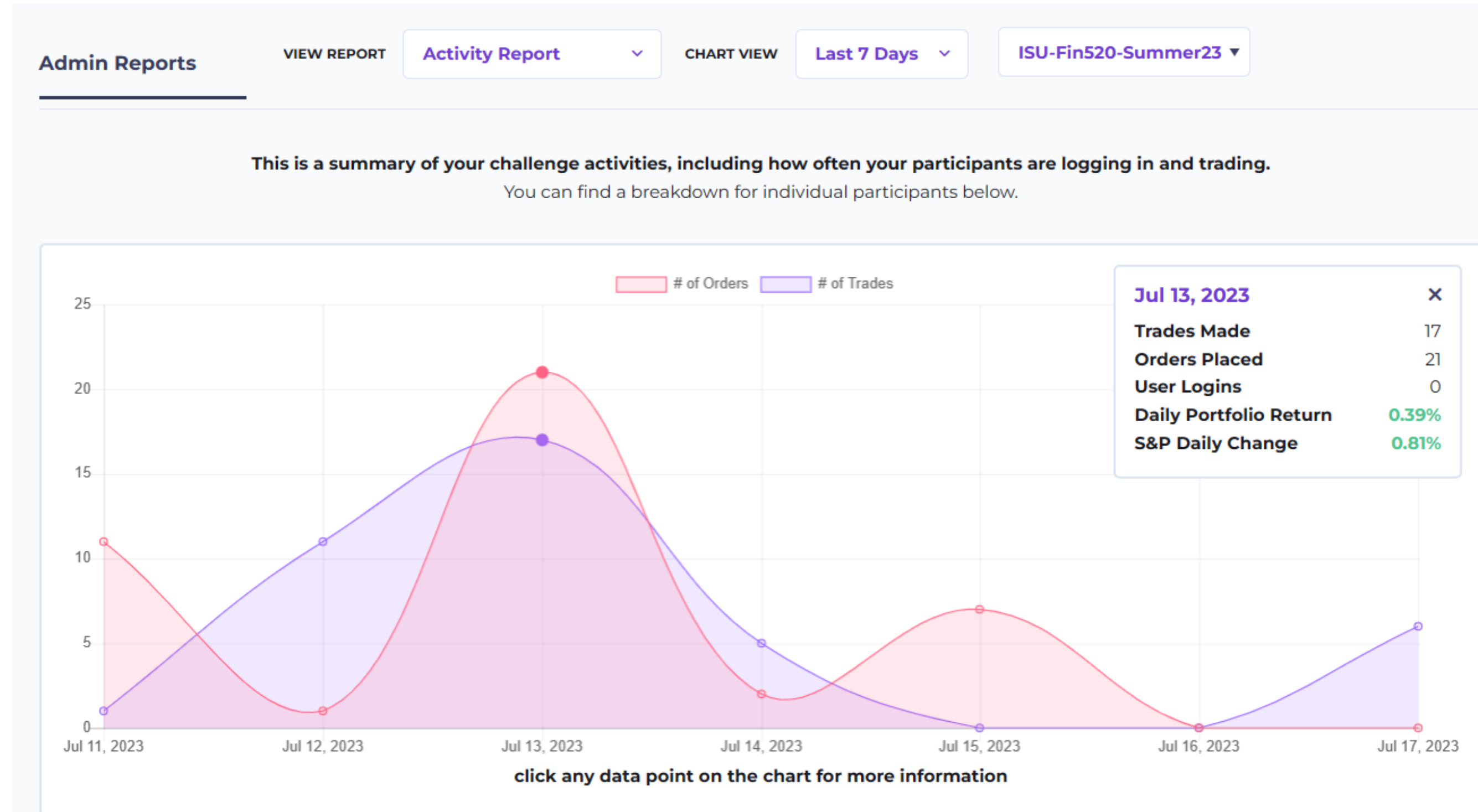
This section provides you with an **overview of your student/user accounts**, such as trading and login activity.

USER	NAME	# TRADES	LAST TRADE	PORTFOLIO VALUE	YEST. VALUE	CASH	BUYING POWER	MV LON
★ cwood66	Cassandra Wood	0	n/a	1,000,000.00	1,000,000.00	1,000,000.00	2,000,000.00	0.00
★ coyotes24	---	0	n/a	1,000,000.00	1,000,000.00	1,000,000.00	2,000,000.00	0.00
★ pro_tutorial25	Pro Tutorial	0	n/a	1,000,000.00	1,000,000.00	1,000,000.00	2,000,000.00	0.00

ACTIVITY REPORT

Chart View:

- 7-day
- 14-day
- 30-day



DIVERSIFICATION REPORT

Admin Reports

VIEW REPORT

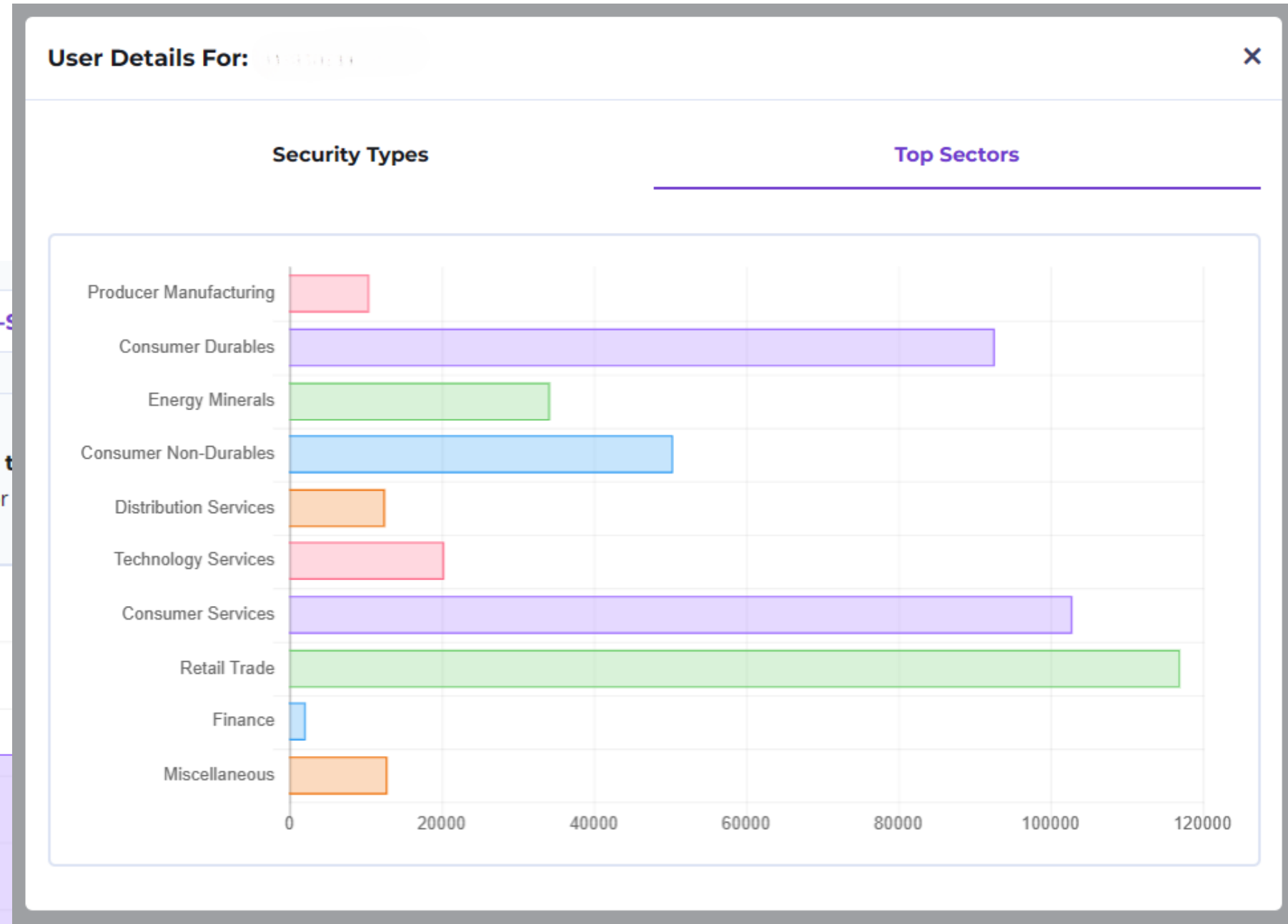
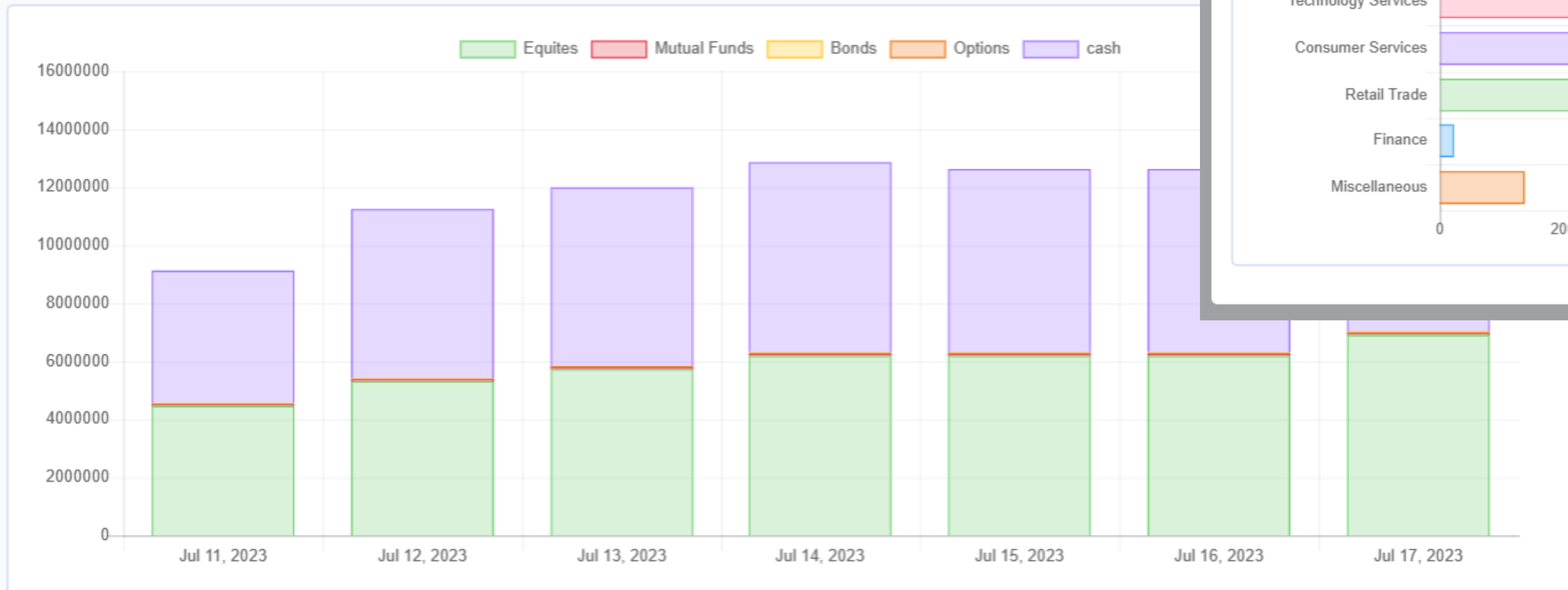
Diversification Report

CHART VIEW

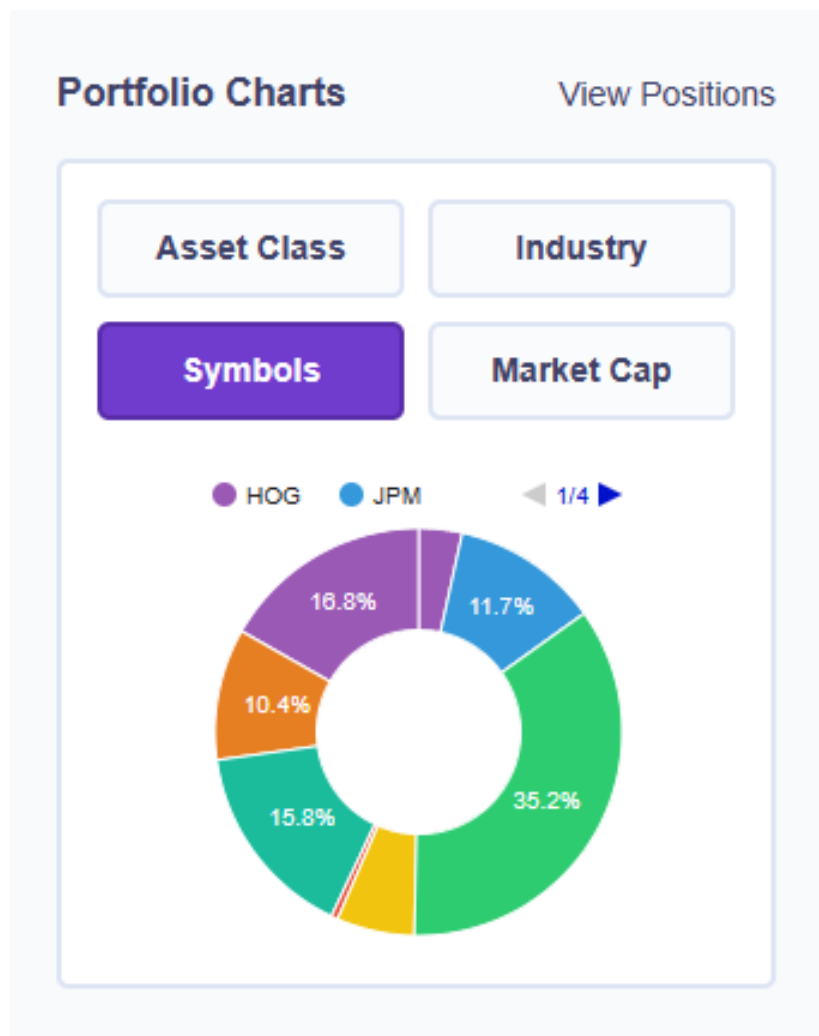
Last 7 Days

ISU-Fin520-S

This is a summary of the holdings of your participants, including a breakdown of the security types. You can find a more detailed summary for each participant below, including a breakdown by sector.



TOP TRADED SECURITIES



Admin Reports

VIEW REPORT

Top Traded Securities ▾

Print

Export To Excel

ISU-Fin520-Summer23 ▾

ORDER SIDE

All ▾

FILTER

Securities ▾

START/END DATES

06/18/2023

07/18/2023

This section allows you to **view the top traded stocks** for this tournament.

MOST TRADED SECURITY	TOTAL NUMBER OF TRADES
NVDA	6
DIS	4
AAPL	4
TSLA	4
WMT	3
TM	3

FULL SESSION PORTFOLIO EXPORTS

Select Option For Export

DOWNLOAD SPREADSHEET (CSV)

GOOGLE DRIVE (BETA)

EMAIL

Admin Reports VIEW REPORT Report Downloads ISU-Fin520-Summer23

Download **class reports to CSV or Google Drive (beta)** for further sorting and analysis.

Download this report to **view all your student/user account balances, transaction history, and open positions** all in one place.

Download this report to **compare all your student/user portfolio values** by date, side by side.

Download this report to **see all student's trade notes.**

Download this entire class **account details such as open positions, account balances or transactions over a certain date/period.** Choose the date and the type of account details you want.

Account Balances on/until 7/17/2023

CUSTOM REPORTS

Create your own report and choose from the available parameters. Click the **+ button** to open each section.

Create Custom Report

REPORT NAME

Custom Report

Create →

Build your own custom report. Select which columns you'd like to include and track. Build up to 5 reports.

Note, you can  cancel or delete custom reports between challenges.

Available Fields

User Information

+

Current User Activity

-

Last Login Date

Add

Value

Add

Buying Power

Add

Trades Made

Add

Included Fields

Username

Remove

Buying Power (7/23/2023)

Remove

Trades Made (7/23/2023)

Remove

Last Activity (7/23/2023)

Remove

Market Value Long (7/23/2023)

Remove

Market Value Short (7/23/2023)

Remove



STILL NEED ASSISTANCE?

CONTACT SUPPORT

SUPPORT@STOCKTRAK.COM