

**Quest for Securities & Investment Elites (QSIE)  
Case Analysis Competition 2020**

**2020 證券與投資精英大比拼**

**Sponsored by  
Chartered Institute for Securities & Investment**



**Presented by  
China Tonghai Securities Limited - Direct Spot**



**Organised by  
EL Education Academy**



**Entry Requirements and Information Sheet**

**1. OBJECTIVE**

Acquiring a high level of knowledge and familiarization of securities and investment is valuable in planning for one's future. This competition requires you to work as a member of a team to produce a Written Report and analysis for a case by utilizing data / information that are provided to you. Evaluation will be based on candidates' analytical, presentation and report writing skills.

**2. ENTRY REQUIREMENTS**

Participating universities/higher education institutions in Guangdong-Hong Kong-Macau Greater Bay Area, Hainan Island and nearby region will nominate their teams for entering into the competition. Each team consists of Two Year 1 / Year 2 / Year 3 / Year 3 Top Up business/accounting/finance/financial management/auditing/taxation students.

**3. COMPETITION RUN-DOWN**

Materials Available Date	After 15 December 2019	From EL Education Academy (josiahpang@eleducationacademy.org)
Entry Deadline (nomination of students*)	On or before Monday, 14 September 2020	To EL Education Academy (josiahpang@eleducationacademy.org)
Submission of Written Report	Wednesday, 28 October 2020	To EL Education Academy (josiahpang@eleducationacademy.org)
Announcement of Finalists **	Friday, 30 October 2020	From EL Education Academy (josiahpang@eleducationacademy.org)
Presentation & Q & A Session, Award Presentation Ceremony	Saturday, 28 November 2020 (To be confirmed)	Hong Kong

\* Each university/higher education institution can nominate one team 2 students (Year 1 / Year 2 / Year 3 / Year 3 Top-up business / accounting / finance / financial management / auditing / taxation students) to participate the competition.

\*\* Through Open Channel, i.e. other Year 1 / Year 2 / Year 3 / Year 3 Top-up business / accounting / finance / financial management / auditing / taxation students can also join by paying a non-refundable enrolment fee of RMB500 per team when they submit the Written Report. Top five teams of the Open Channel can also join together with the universities / higher education institution nominated teams to the Presentation & Q & A Session in Hong Kong on Saturday, 28 November 2020.

#### **4. RULES AND REQUIREMENTS**

Each team has to conduct an analysis on the data / information given and prepare the reporting materials which are ready for integrating into the Written Report.

4.1 Written Report of maximum 10 pages. (at the Written Report Session)

4.2 PowerPoint presentation of a maximum 15 slides (at Presentation & Q & A Session)

4.3 Tables of the analysis you have conducted demonstrating how you have worked with the data / information provided.

Your report will be evaluated based on the content and quality of information, not on the design.

Please be reminded that these are the basic requirements the judges are looking for in the report. You can make modifications to the report structures, if you think these changes can help you with your overall presentation of materials.

#### **5. WRITTEN REPORT**

The written report, including tables, figures, charts and appendices, must be no more than 10 pages (excluding references and covering page). Please note the following requirements for the written report:

Paper size	A4
Language	English
Font	Arial
Font size	12
Font color	black
Line spacing	1.15
Left margin	2.5 cm
Right margin	4.0 cm

Each page should be denoted with page number.

Requirement for covering page:

The following details should be included on the coverage page:

1. Date of submission
2. Name of university / higher education institution
3. Address of university / higher education institution including faculty/department name
4. Name of team members
5. At least one of the team member's email address should be given for ease of communication
6. Universities/higher education institution nominated teams or Open Channel teams

You are required to pay attention to the regulations on plagiarism.

## 6. **ASSESSING METHODS AND CRITERIA**

6.1 Your performance will be assessed by a panel of judges who are experts in this field.

Parts assessed will be:

- ✚ The Written Report in English (30% out of 100%)
- ✚ 15-minutes Presentation in English (60% out of 100%)
- ✚ 1-minute Q&A Session in English (10% out of 100%)

6.2 Marks will be given under a strictly designed standard.

## 7. **SUBMISSION DATES**

7.1 Please note that the submission must be both in electronic format and hard copy format.

- ✚ For the written report, electronic copy should be forwarded to [josiahpang@eleducationacademy.org](mailto:josiahpang@eleducationacademy.org) on Wednesday, 28 October 2020. Three marks will be deducted for late arrivals / changes of the original written report.
- ✚ Announcement of Finalists will be made on Friday, 30 October 2020. For the presentation, electronic copy should be forwarded to [josiahpang@eleducationacademy.org](mailto:josiahpang@eleducationacademy.org) on Wednesday, 25 November 2020. Five marks will be deducted for late arrivals / changes of the presentation.
- ✚ 2 hard copies bounded in plastic folder should be provided to Josiah Pang on Saturday, 28 November 2020.

7.2 Presentation and Q&A session will be held on Saturday, 28 November 2020. Time slot for each team will be decided on Saturday, 28 November 2020 before commencement of competition.

Please also pay attention to the announcement made by the organizers, as changes might be made at any stages of the competition.

## **8. TIPS TO GET STARTED**

For the case analysis, please make sure you have a thorough understanding of the materials. Be sure to pinpoint and highlight issues you decide to focus on, and construct a solid structure for the report. We appreciate originality, thus we are more interested in your ideas. You can use figures, graphs, images to support your points. Models can be useful when coming to analysis and illustrate possible solutions to the current issue. Please clearly state the citations and reference included in your reports to avoid plagiarism.

Please conduct your presentation based on your report and your findings. It would be useful to keep the presentation simple, and present your ideas with evaluations. Make sure the pace and materials you are going to present can actually help the panel of judges to understand your analysis and ideas.

## **9. UNFORESEEN CIRCUMSTANCES & RIGHT RESERVED**

If circumstances which affect the progress of a team's project arise and these are not dealt with elsewhere in this document, then the organizers reserve the right to respond as they deem appropriate. The organizers reserve the right to display the submitted materials from participating teams for future use and publication /promotion purposes.

## **10. THE FINAL DECISION**

The Organizers have the sole right to decide on the winning team based on the assessment requirements.

**THE END**