

FTSE 100 Investment Competition (February to April 2023) Rules

1. **Objective:** The object of the competition is to invest a notional £50,000 in an Investment Portfolio of shares in between five and ten companies quoted on the FTSE100 London Stock Exchange, which over a specified period of twelve weeks finishes at the largest amount in the competition, even if less than the commencing value of £50,000.

2. **Entry:** The competition shall commence at 08:00 hours on Monday 6th February 2023 and finish at 16:30 hours on Friday 28th April 2023. The starting price for the shares of each company shall be the closing price on Friday 4th February 2023. Competitors must complete an entry form and pay the entrance fee of £10. The form is supplied in both xlsx and pdf format.

3. **Investment Portfolio:** A competitor shall in the entry form name between five and ten companies for their shares to be in the Investment Portfolio and the amount of the notional investment in each company, which must total £50,000 for the whole portfolio. The composition of the Investment Portfolio cannot be changed during the period of the competition. As no shares are actually bought or sold, the value of each investment in a portfolio will be determined by the increase/decrease in the value of your portfolio over the period in question. Each Investment Portfolio will start with a total value of £50,000 and will be valued at the finish of the competition based on the FTSE100 price of the shares in it at the close of business of the London Stock Exchange on Friday 27th April 2023. No account will be taken of any dividends paid during the period of the competition and will not figure in the calculation of revised portfolio values.

4. **Portfolio Name:** A competitor may choose any reasonable unique name for each Investment Portfolio entered, which will be used in publishing interim and final results. Weekly updates will be posted online so **if you do not want your full name to appear there**, please make sure that you give us the name you wish displayed.

5. **Communication:** A competitor shall provide an email address for communication, which will be treated as confidential. Competitors will be notified of the number of shares held in each company in their Investment Portfolio and weekly reports on the performance of all the Investment Portfolios in the competition and the final result will be published by email to the competitors.

6. **Payment:** Payment of the entry fee must be made before 6th February either by bank transfer or cheque. It will be preferred if a bank transfer is used. A bank transfer for each entry should be made to **Rotary Club of West Fife Charitable Trust** (sort code 80-06-55 account number 00707555). If paying by cheque please make payable to Rotary Club of West Fife Charitable Trust should be sent by post to Douglas Scott, 47 Craigmias Grove, Dalgety Bay, KY11 9XR with the entry form giving the competitor's Investment Portfolio name and email address. A cheque can be sent for a number of entries, but it must have with it a note of all Investment Portfolio names and an email address for each entry.

7. **Result and Prizes:** All the Investment Portfolios will be ranked according to their finishing value. The winner shall be the competitor whose Investment Portfolio is valued at the finish at the largest amount in the competition, even if less than the commencing value of £50,000. The prize will be a voucher for £100, with a wooden spoon prize, a bottle of malt whisky to the competitor with the lowest value Investment Portfolio.

8. **Demoted Companies:** In the event that a company leaves the FTSE100 Index during the period of the competition its shares shall remain eligible for the competition and shall be valued at the London Stock Exchange price and be included in the result of the competition