

# T Level Level 3 Finance (Investment Banking & Asset & Wealth Management)

## Part A - Bridging Work Task

This is a fantastic opportunity to expand your understanding of **Finance** as you prepare for enrolment and start at Franklin in September.

Please complete the work and bring a copy to your enrolment, either printed or electronically.

The work will take you around 2 hours so plan your time to best suit you.

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| <b>How do I complete and submit my task?</b> | <p>Complete the tasks on paper/handwritten or digitally, and bring a copy, either paper or electronically, to your enrolment appointment. Also, bring this along to your first lesson in September.</p> <p>If you didn't attend the Taster Day, don't worry. It isn't essential for completing this work, but please ensure that you have completed this bridging work.</p>                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Introduction to your Bridging Task</b>    | <p>Students will explore how finance and the stock market intersect by analysing a publicly traded company. They will investigate financial performance, stock trends, and the role of finance in investment decisions.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Task details</b>                          | <p><b>Part 1: Choose a Public Company (15 mins)</b></p> <ul style="list-style-type: none"><li>• Pick a UK-listed company (e.g., Tesco, Barclays, Rolls-Royce).</li><li>• Use a platform like Yahoo Finance UK or London Stock Exchange to find:<ul style="list-style-type: none"><li>○ Current share price</li><li>○ 1-year stock performance</li><li>○ Basic company profile</li></ul></li></ul> <p><b>Part 2: Financial Concepts in the Stock Market (30 mins)</b></p> <ul style="list-style-type: none"><li>• Define and explain:<ul style="list-style-type: none"><li>○ <b>Market Capitalisation</b></li><li>○ <b>Dividend Yield</b></li><li>○ <b>Price-to-Earnings (P/E) Ratio</b></li></ul></li><li>• Use your chosen company to illustrate each concept.</li></ul> |

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|                                                            | <p><b>Part 3: Stock Market Simulation (30 mins)</b></p> <ul style="list-style-type: none"> <li>• Use a free stock market simulator or demo account: <ul style="list-style-type: none"> <li>○ eToro Demo Account</li> <li>○ Investopedia Simulator</li> </ul> </li> <li>• “Invest” £1,000 in your chosen company.</li> <li>• Record: <ul style="list-style-type: none"> <li>○ Why you chose it</li> <li>○ What you expect to happen to the share price</li> <li>○ What financial indicators influenced your decision</li> </ul> </li> </ul> <p><b>Part 4: Business Scenario Analysis (30 mins)</b></p> <ul style="list-style-type: none"> <li>• Imagine the company is planning a major expansion.</li> <li>• Answer: <ul style="list-style-type: none"> <li>○ How might this affect its share price?</li> <li>○ What financial risks and opportunities are involved?</li> <li>○ How would investors react?</li> </ul> </li> </ul> <p><b>Part 5: Reflection (15 mins)</b></p> <ul style="list-style-type: none"> <li>• What did you learn about the stock market?</li> <li>• How does this relate to finance roles like investment analyst or risk manager?</li> <li>• How might this help you in the T-Level Finance course?</li> </ul> |
| <p><b>Resources to help you with the Bridging Task</b></p> | <ul style="list-style-type: none"> <li>• <a href="#"><u>T-Level Finance Overview – Gov.uk</u></a></li> <li>• <a href="#"><u>Pearson T-Level Finance Resources</u></a></li> <li>• <a href="#"><u>T-Level Finance Specification PDF</u></a></li> </ul> <p><input checked="" type="checkbox"/> <b>Stock Market Learning Platforms</b></p> <ul style="list-style-type: none"> <li>• <a href="#"><u>Stock Market for Beginners – One Education</u></a></li> <li>• <a href="#"><u>MoneyMagpie: Best Investing Platforms for Students</u></a></li> <li>• <a href="#"><u>IG Trading Platform – Beginner Friendly</u></a></li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

## Extension Tasks

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| <b>Extension Tasks to stretch and challenge you</b> | <ol style="list-style-type: none"> <li><b>Pick a Second Company</b><br/>Choose another UK company from a different industry than your first one.<br/>Example:             <ol style="list-style-type: none"> <li>If you picked Tesco first, now choose Rolls-Royce or Barclays.</li> </ol> </li> <li><b>Compare the Two Companies</b> Use Yahoo Finance UK or London Stock Exchange to find:             <ol style="list-style-type: none"> <li>Share price</li> <li>Market capitalisation</li> <li>Dividend (if any)</li> <li>1-year stock performance (up or down?)</li> </ol> </li> <li><b>Answer These Questions</b> <ol style="list-style-type: none"> <li>Which company is worth more on the stock market?</li> <li>Which one has performed better in the last year?</li> <li>What might explain the difference? (Think: industry, news, economy, etc.)</li> <li>If you had £1,000 to invest, which would you choose and why?</li> </ol> </li> </ol> |
| <b>Massive Open Online Courses (MOOCs)</b>          | <p>You might enrol and complete the following to push you a little further (this is optional):</p> <p><u><a href="#">Politics</a> <a href="#">Philosophy</a> <a href="#">Economics</a> <a href="#">University Taster</a>   <a href="#">Springpod</a>   <a href="#">Springpod</a></u></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

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## Part B – Preparing for Studying at Franklin

A fantastic opportunity to widen your understanding of the course.

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| <b>Examining Board and Specification</b> | <a href="https://www.tlevels.gov.uk/students/subjects/finance">https://www.tlevels.gov.uk/students/subjects/finance</a>                                                                                                                                                                                                                                                                                                |
| <b>Preparing for the course</b>          | <p>Some activities that bring the subjects' interest and progression opportunities to life, that you could try;</p> <p><a href="#">Monetary policy   Bank of England</a></p> <p><a href="#">Business   Latest News &amp; Updates   BBC News</a></p> <p><a href="#">Listen to 'The Martin Lewis Podcast' (moneysavingexpert.com)</a></p> <p><a href="#">Competition and Markets Authority - GOV.UK (www.gov.uk)</a></p> |