Summary of Financial Literacy and Education Support Activities for FY2017

(April 2017 – End of March 2018)
Summary of Financial Literacy and Education Support Activities for FY2017 (Activities for Schools)
Summary of Financial Literacy and Education Support Activities [Activities for Schools]

**Developing and Providing Teaching Materials**
- **Let's Form a Stock Company! A Challenge from Mr. X**
  - FY17: 309 institutions, 31,458 participants
  - FY16: 341 institutions, 33,622 participants
- **Three Doors to Understanding the Economy**
  - Let's Take a Voyage of Economic Discovery
  - FY17: 292 institutions, 28,524 participants
  - FY16: 348 institutions, 33,091 participants
- **Stock Learning Game**
  - FY17: 825 institutions, 42,278 participants
  - FY16: 800 institutions, 35,643 participants

**Providing Information to Schools**
- **Summer Seminar for Teachers**
  - FY17: 477 participants (8 venues)
  - FY16: 551 participants (9 venues)
- **Experience Finance and Security Program**
  - FY17: 139 participants (Tokyo/Osaka/Nagoya)
  - FY16: 128 participants (Tokyo/Osaka/Nagoya)
- **E-mail newsletter for educators**
  - FY17: 2,505 subscribers
- **“Rainbow News” information magazine for educators**
  - 22,000 copies per issue (3 p.a.)
- **Website “Kinyukeizai Navi”**
  - FY17: 149,419 accesses
  - FY16: 87,131 accesses

**Dispatching Lecturers To Schools**
- **Saturday Educational Activities**
  - FY17: 141 institutions (297 classes, 9,204 participants)
  - FY16: 121 institutions (238 classes, 7,147 participants)
- **Financial Literacy Delivery Course**
  - FY17: 121 institutions (220 classes, 13,785 participants)
  - FY16: 102 institutions (185 classes, 12,200 participants)

**Offering Support/Collaboration**
- **Support for “Study Group on the Promotion of Financial and Economic Education” (Chaired by Naoyuki Yoshino)**
  - FY17: 31 universities, 45 organizations, 552 participants
  - FY16: 29 universities, 42 organizations, 488 participants

**Global Activity**
- **Participation in International Investor Education Activities**
  - FY17: 121 institutions (220 classes, 13,785 participants)
  - FY16: 102 institutions (185 classes, 12,200 participants)

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(a) Hands-on teaching material: “Let’s Form a Stock Company! A Challenge from Mr. X” (for Junior High School Students)

The purpose of the program is to deepen understanding on the structure, roles and social responsibility of stock companies, as well as on the framework of finance, focusing on companies (corporations). Materials mainly targeting junior high school students are provided free of charge to interested institutions.

- Hands-on teaching material for conducting classes through group work, asking students to prepare plans and funding for a company, as well as to discuss the effects of economic news on corporate performance.

- 31,458 students from 309 institutions across Japan used the material in FY17 (33,622 students in 341 institutions in FY16)

[Securities Knowledge Proliferation Project]

◆ “Let’s Form a Stock Company! A Challenge from Mr. X” Teaching Material Kit

The kit is composed of three parts and can be adapted to single class Instruction guidelines and video clips for teachers are attached

◆ Video clip for teachers
The kit is composed of three parts and can be adapted to single class instruction guidelines and video clips for teachers are attached

◆ Video clip for teachers
(c) Stock Learning Game

- The purpose of the program is to study the actual movements in economy and society that cause changes in share prices through simulated stock trading in class. Simulation materials mainly targeting junior high school to university students are provided free of charge to interested institutions.
- 42,278 students from 825 institutions across Japan used the materials in FY17 (35,643 students in 800 institutions in FY16)

[Joint project with the Tokyo Stock Exchange]

◆ “Stock Market Game” Teaching Material Kit

◆ “Stock Market Game” website (http://www.ssg.ne.jp/)
The purpose of the project is to deepen knowledge on finance, economy and society through discussion after viewing a recorded NHK television program. Teaching materials mainly targeting junior high and high school students are provided free of charge to interested institutions.

- Class on seven key phrases appearing in junior high school civics and home economics textbooks can be conducted using part of a session (within 20 minutes)

5,394 students in 67 institutions across Japan used the material in FY17 (first year of program)

“Immersion! The Economic World for Everybody”: 7 Themes

| CONTENTS |
|------------------|------------------|
| 1. 株式会社       | 株式会社のなりたち |
| 2. 株式会社       | 株式会社の仕組み |
| 3. 間接金融       | 銀行の役割 |
| 4. 間接金融       | お金借りてみよう |
| 5. 直接金融       | 直接金融の仕組み |
| 6. 直接金融       | 株式の特徴 |
| 7. 株式市場       | 発行市場と流通市場 |
| 8. 株式市場       | 企業の業績と株価の関係 |
| 9. 経済的な自立   | どう稼ぐ？どう貯める？（収入と貯蓄） |
| 10. 経済的な自立  | 家計のマネジメント |
| 11. 金融商品      | 金融商品とは？ |
| 12. 金融商品      | 金融商品の選び方 |
| 13. 持続可能な社会 | 家計と社会のつながり |
| 14. 持続可能な社会 | 金融を通じた社会参画 |

Teaching material is composed of 14 chapters on 7 themes; each chapter can be taught in 20 minutes
Recording of an NHK television program and instruction guidelines for teachers are attached
1. Elementary and Junior High School Education Support
   (1) Developing and Providing Teaching Materials
   (e) “Stock Company System and Securities Market Framework”

(e) Finance and Securities Study Material: “Stock Company System and Securities Market Framework”

- Supplementary teaching materials that provide easy-to-understand explanations on the roles of the stock company system and the economic significance of stocks using illustrations mainly targeting high schools are provided free of charge to interested institutions.
- 7,918 copies were provided in FY17 (10,851 copies in FY16)
“Kinyukeizai Navi” website (http://www.kinyu-navi.jp/)

- The “Kinyukeizai Navi” website was established to support learning of the basics of securities and finance using PC or smartphone, mainly targeting teachers and students of junior high and high schools.
- Contents include “Let’s Learn! Finance and Economics” (comics and quiz-based courses on basic knowledge), “Walking in the Finance District” (explanation of various financial institutions), and “Hot Blooded! The Economist Family” video. Information on teaching materials and events provided by the Securities Knowledge Proliferation Project is also provided.
- 149,419 accesses in FY17 (87,131 accesses in FY16)
Mail magazine for teachers: “Finance and Economy in 5 minutes”

- Mail magazine that provides explanations, basic knowledge and tips on teaching classes on economy/finance/securities related topics with sample scripts is distributed about three times each month (started in February 2017).
- 2,505 subscribers as of end of March 2017

**<Magazine Topics>**

- **“Now I Get It! The Economy News”**
  Fun explanation of news topics that may be interesting to students from economics and finance

- **“My Surefire Topic to Make Classes Interesting”**
  Introducing the infallible class topics by university professors, working teachers and economists

- **“Useful Finance FYI”**
  Explanation on knowledge that could also be useful for teachers, including financial terms, latest financial systems and products

**E-mail magazine information:**
http://www.jsda.or.jp/manabu/web_curriculum/mailmagazine.html
1. Elementary and Junior High School Education Support
   (2) Providing Information for Teachers and Schools
   (c) Seminars for Teachers

i. Summer seminar (mainly for civics and social studies teachers)

- Mainly targets junior high and high school civics and social studies teachers, aiming to provide information on the economy and financial and capital markets to supplement the content of school classes.
  - The program includes lectures by experts on popular themes requested by the previous year’s participants, as well as workshops for promoting the use of hands-on teaching materials for junior high and high schools. It is run in cooperation/collaboration with Zenkoku Kominka/Shakaika Kyoiku Kenkyukai (Japan Association of Civics and Social Studies Education) and the Central Council for Financial Services Information.
- Seminars were held in eight venues across Japan between late July and mid-August in FY17 (Takamatsu event cancelled due to typhoon) with 477 participants (9 venues, 551 participants in FY16)
- Transcripts of some of the lectures from the seminars are published on the JSDA website

ii. Experience Finance and Securities Program for Teachers

- The purpose of the program is to deepen understanding of the stock company system and securities market by elementary, junior high and high school teachers interested in securities, regardless of their specialized subjects
  - Lectures on the basics of securities, workshop on teaching materials, observational tour of stock exchange, etc.
- Held in Tokyo (August), Nagoya (December) and Osaka (March) in FY17, with 139 participants (128 participants in FY16)
“Rainbow News” information magazine for teachers

- Information magazine is sent to junior high schools, high schools, and the Board of Education across Japan to promote education on finance and the economy (three times a year, 22,000 copies for each issue).
- Contents include interviews with celebrities concerning education on finance and the economy, explanation of economic topics and phrases, class reports by teachers (use of hands-on education material, etc.), articles on company visits, and introduction of events by Securities Knowledge Proliferation Project related organizations.
- Current issue and back numbers are posted on the “Kinyukeizai Navi” Website (http://kinyu-navi.jp/textbook/contents4/index.html) [Securities Knowledge Proliferation Project]
1. Elementary and Junior High School Education Support
(3) Dispatching lecturers to elementary/junior high/high schools (Saturday Classes)

Class delivery to elementary/junior high/high schools (Saturday Classes)

- Participation in the “Saturday Study Volunteer Support” initiative by the Ministry of Education, Culture, Sports, Science and Technology in 2014 led to the “Delivery Course” program which dispatches lecturers for classes in elementary, junior high, and high schools across Japan as part of efforts to further financial and economic education.
- Hands-on format classes that teach that stocks and direct financing are important frameworks for supporting society.
- The lecturers are employees of JSDA or employees of cooperating members of JSDA and registered Finance/Securities Instructors.
- Lecturers were dispatched to 141 institutions (297 classes) with 9,204 participants in FY17.

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<thead>
<tr>
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<th>FY17</th>
<th>FY16</th>
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<tbody>
<tr>
<td><strong>Saturday Classes</strong></td>
<td>141 institutions 297 classes 9,204 participants</td>
<td>121 institutions 238 classes 7,147 participants</td>
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<tr>
<td></td>
<td>*104 elementary schools, 11 junior high schools, 11 high schools, and 15 others</td>
<td>*89 elementary schools, 9 junior high schools, 9 high schools, and 14 others</td>
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<tr>
<td><strong>Saturday Educational Activities</strong></td>
<td>55 institutions 120 classes 3,581 participants</td>
<td>51 institutions 118 classes 3,472 participants</td>
</tr>
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<td>6 institutions 6 classes 157 participants</td>
<td>3 institutions 3 classes 78 participants</td>
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<tr>
<td><strong>Weekday Classes</strong></td>
<td>67 institutions 153 classes 4,915 participants</td>
<td>53 institutions 97 classes 2,904 participants</td>
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<td>13 institutions 18 classes 551 participants</td>
<td>14 institutions 20 classes 693 participants</td>
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</tbody>
</table>

◆ “Challenge! Snack Co., Ltd.” workbook

<Activity Format>
Saturday Classes: Classes are held for all pupils/students, mainly sponsored by the schools as part of the regular curriculum.
Saturday Study: Led by parties other than schools (PTA, local community, etc.) for interested participants.
Weekday Classes: Above activities held on weekdays.
Other: Events for children sponsored by MEXT, Finance Bureau, and Civic Halls, etc.

◆ Group work projects
1. Elementary and Junior High School Education Support
(3) Dispatching lecturers to elementary/junior high/high schools (Saturday Classes)

“Challenge! Snack Co., Ltd.” was included as one of the 8 examples in the “Handbook on Collaboration between Community and Schools” (published in January 2018) prepared by the MEXT Lifelong Learning Policy Bureau.
2. Activities for University Students
   (1) Dispatch Lecturers for University Students

Dispatch Lecturers for University Students (Financial Literacy “Home Delivery” Lectures)

- Lecturers are dispatched free of charge to universities across Japan (undergraduate classes, career centers, etc.) for the purpose of improving financial literacy and deepening understanding of the securities business by university students, who are at the stage of establishing their abilities to become independent professionals. The program introduces the importance of money plans based on life planning, the significance of securities investment and market, and the securities business.
- The lecturers are officers and employees of the JSDA and registered Finance/Securities Instructors.
- Total of 220 lectures were delivered in 121 universities in Japan, with 13,785 participants in FY17.

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<thead>
<tr>
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<th>FY17</th>
<th>FY16</th>
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<tr>
<td>Financial Literacy</td>
<td>121 universities, 220 lectures (13,785 participants)</td>
<td>102 universities, 185 lectures (12,200 participants)</td>
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<tr>
<td>Securities Market/Securities Industry</td>
<td>156 Lectures at 93 universities</td>
<td>115 Lectures at 74 universities</td>
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<td>64 Lectures at 49 universities</td>
<td>70 Lectures at 48 universities</td>
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</table>

* The total number of universities varies as some lectures covered both topics.
Seminars and Information Provision for University Students

- The content of the “Personal Finance Seminar” and “Entrepreneurship and Finance Seminar”, which were held to enable the undergraduate and graduate students to become independent members of society equipped with financial literacy, was posted on the portal site for university students (226 total participants for seminars)

◆ Personal Finance Seminar

◆ Entrepreneurship and Finance Seminar
Support for All-Japan Student League for Securities Study Activities

- Continued support for the activities of the All-Japan Student League for Securities Study (national body of university student securities study circles (academic study circles) and university student securities and finance seminars)
- JSDA supports the “Securities Seminar Convention,” which is held by the League annually in December with university circles from around Japan invited to discuss various topics related to securities and finance over the course of two days; as well as spring seminars held by the regional leagues (Tokyo, Osaka, and Nagoya).
- FY17 Securities Seminar Convention was held on December 8-9 in Tokyo, with participation of 552 students from 31 universities around Japan (44 organizations, 113 teams), and discussions held among 19 blocks (488 students from 29 universities participated in FY16)

[FY17 Discussion Themes]
(1) Activating the domestic securities market
(2) Investment trust as a tool for asset building
(3) Enhancement of financial literacy at the school level
(4) Future approaches to securities company management
(5) Institutional investor behavior and securities market
(6) Status of financing for Japanese companies

◆ Securities Seminar Debates
◆ Securities Seminar Awards Ceremony
Support for Activities of “Study Group on the Promotion of Financial and Economic Education”

- JSDA is supporting the activities of the “Study Group on the Promotion of Financial and Economic Education,” which gathers educational and financial experts under one roof to discuss the promotion and enhancement of financial and economical education (Chair: Naoyuki Yoshino, Professor Emeritus, Keio University). JSDA also serves as its secretariat.

[Activities for FY17]

- Prepared “Reference material for preparing the textbook based on the next School Curriculum Guideline: Factors, diagrams and data on finance and securities” reflecting the Guideline for junior high schools in January 2018, and provided information to textbook publishers

- Cooperated with Talent Development Education Research Foundation to prepare the e-learning lecture contents for the renewal of teaching licenses, “Financial Literacy 101 for Kids: Useful Pointers on How to Handle Money” (Distribution began at the end of September 2017, with 147 teachers taking the course within FY16)

- Prepared and submitted an opinion dated March 15, 2018 to the Ministry of Education, Culture, Sports, Science and Technology in response to the public comment period for the draft School Curriculum Guideline
Participation in the International Forum for Investor Education (IFIE)

- As the Chair of the International Forum for Investor Education (IFIE) (appointed in June 2017) and Chair of the Asia Chapter (appointed in June 2014), participated in conferences, etc. held by the Forum and actively exchanged information with the representatives.
- In June 2017, JSDA participated in the panel discussion “Addressing Needs of an Aging Demographic and a Large Cohort of Young Adults” at the IFIE-IOSCO Investor Education International Conference held in Rio de Janeiro, Brazil. JSDA also served as the Chair for the Asia Chapter Annual General Meeting held at the same time.
- In November 2017, JSDA served as the Chair for the interim meeting of the Asia Chapter held in Tokyo.

- Panel discussion
- Material used by JSDA at the conference
- Presentation on the aging of the Japanese population and measures taken
Summary of Financial Literacy and Education Support Activities for FY17
(Activities for the General Public)
## Summary of Financial Literacy and Education Support Activities

### Activities for General Public

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<th>Young Professionals</th>
<th>General Professionals</th>
<th>Senior Citizens</th>
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<tbody>
<tr>
<td><strong>Providing Web Contents</strong></td>
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<tr>
<td>Start Today! Asset Management and Securities Investment</td>
<td>FY17: 19,473 accesses</td>
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<tr>
<td>Asset Management and Securities Investment Start Book</td>
<td>FY16: 289 accesses (launched on March 31)</td>
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<tr>
<td>Web Comic (2 series, 5 episodes, 1 column)</td>
<td>FY17: 88,979 accesses</td>
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<tr>
<td>“Hamakan” Investment Management Theater</td>
<td>FY16: 37,861 accesses</td>
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<tr>
<td>Learn with Video! Easy-to-Understand: Basic Knowledge of Securities Investment</td>
<td>FY17: 75,261 accesses</td>
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<tr>
<td>Finally starting! Junior NISA The All-Advantageous NISA System</td>
<td>FY16: 39,018 accesses</td>
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<tr>
<td>Electronic Book App</td>
<td>FY17: 6,347 downloads</td>
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<td>Special site for “Securities Investment Day”</td>
<td>FY16: 4,715 downloads</td>
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<td></td>
<td>FY17: 320,215 accesses</td>
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<td>FY16: 228,157 accesses</td>
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<tr>
<td><strong>Producing and Publishing Materials</strong></td>
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<tr>
<td>Asset Management and Securities Investment Start Book</td>
<td>FY17: 53,000 copies, e-book: 2,388 downloads</td>
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<tr>
<td>“Introduction to Defined Contribution Pension Plans”</td>
<td>FY16: 48,000 copies</td>
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<tr>
<td>“Securities Tax System Q&amp;A for Individual Investors”</td>
<td>FY17: 15,000 copies</td>
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<tr>
<td></td>
<td>FY16: 13,000 copies</td>
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<tr>
<td><strong>Conducting Seminars</strong></td>
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<tr>
<td>First Time Asset Management Lecture</td>
<td>FY17: 5,659 participants (54 venues, 108 lectures)</td>
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<tr>
<td>Basics/Application FY16: 4,435 participants (42 venues, 84 lectures)</td>
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<tr>
<td>NISA/iDeCo seminar FY17: 602 participants (6 venues) FY16: 169 participants (2 venues)</td>
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<tr>
<td>For Young Investors FY17: 242 participants (3 venues) FY16: 188 participants (3 venues)</td>
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<tr>
<td>For Senior Investors FY17: 176 participants (3 venues) FY16: 212 participants (3 venues)</td>
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<tr>
<td>“Securities Investment Day” Events</td>
<td>FY17: 2,662 participants (29 venues)</td>
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<tr>
<td>FY16: 5,073 participants (20 venues)</td>
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<tr>
<td><strong>Dispatching Lecturers</strong></td>
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<tr>
<td>Dispatch Lecturers for Professionals</td>
<td>FY17: 152 organizations, 357 lectures (12,948 participants)</td>
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<tr>
<td>FY16: 102 organizations, 206 lectures (7,740 participants)</td>
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*Figures indicate the aggregated total number of web page views and YouTube views.*
Set up the “Manabu (education)” page on both the PC and smartphone versions of the JSDA website to provide information online for people interested in learning about asset management and securities investment.
Produced video clips mainly targeting beginners and inexperienced investors to answer questions about starting securities investment and to provide explanations on the specifics of transaction flow (started distribution in March 2018)

◆ Six video clips

Episode 1. “Key Principles of Transaction-1”
Episode 2. “Key Principles of Transaction-2”
Episode 3. “How do you actually trade? Stocks”
Episode 5. “One point issue selection: Stocks”

◆ Website
(https://www.jsda.or.jp/manabu/qanda/index.html)
1. Providing Web Contents
   (3) Video clip “Start Today! Asset Management and Securities Investment”

- Created video clip “Start Today! Asset Management and Securities Investment” based on the contents of “Asset Management and Securities Investment Start Book (Basics)”
A comic strip where the apartment manager (former salesman at a securities company Shoken-san) solves the money problems of his neighbors.

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<thead>
<tr>
<th>Episode</th>
<th>Title</th>
<th>Theme</th>
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<tbody>
<tr>
<td>1</td>
<td>Apartment 104: The Transformation of a Pretentious Man</td>
<td>• Significance of life planning/money planning&lt;br&gt;• Key life events and related expenses</td>
</tr>
<tr>
<td>2</td>
<td>Apartment 213: Ms. Hungry’s “Cake” Making</td>
<td>• Significance of stock investment</td>
</tr>
<tr>
<td>3</td>
<td>Apartment 315: Solidarity! The Aloha Family</td>
<td>• Education expense/cost of living in retirement,&lt;br&gt;• Risk of Investment, diversified investment, investment trusts</td>
</tr>
</tbody>
</table>

◆ Columns at the end of web comics

人生に必要な費用を知るべし！
これから起こるライフイベントにはどれくらいのお金が必要なのかを見てみましょう。もしあなたが人生のはじまり、終わりと考えていていたなら、奥様と出前出後からは理解のライフプランを考えて色々頭脳したものですよ。

結婚費用の目安
-
結婚式や新築家屋は、約15〜25万円、各項目の平均金額の合計は各項目ほぼ同一です。
総額460.7万円
-
出産・リクルートファーストナース「ザ・ライフプランドレッド安泰」

マイホーム購入時
-
マンション
平均購入価格4,245.7万円 889.3万円
-
建売住宅
平均購入価格3,315.5万円 409.4万円
-
土地付立地住宅
平均購入価格3,079.5万円 497.3万円
1. Providing Web Contents
(5) Special Site for “Securities Investment Day” (i)

- Set up a special site specifically for Securities Investment Day and distributed information through website, media, and SNS
1. Providing Web Contents
(5) Special Site for “Securities Investment Day” (ii)

➢ Posted articles summarizing events in Tokyo

Summary of the event:

- **Lecture by a researcher from Recruit Bridal Research Institute**

**Lecture Title:** 自分の未来は、自分で作る ～投資の世界への第一歩～

**Event Name:** Money Expo

A researcher from Recruit Bridal Research Institute gave a lecture on "Investing: The First Step Towards Your Future". After group discussions, the lecturer asked the participants for their impressions, commenting that "There is no correct answer on how to live out our lives. That is why listening to other people’s views and collecting information is important."
Producing and publishing a beginner’s guide that provides explanations on the importance of life planning/money planning; preparing for securities investment; features of various products including stocks, investment trusts and bonds; basic knowledge on specific information gathering and what they mean; and explanation on the NISA, Dollar-Cost Averaging NISA and Junior NISA system (53,000 copies published in FY17)
2. Producing and Publishing Materials
(2) Introduction to Defined Contribution Pension Plans

Introduction to Defined Contribution Pension Plans

- A beginner’s guide providing simple explanations on the mechanism, features and points of notice concerning the defined contribution pension system.
  (15,000 copies published in FY17)

Securities Tax System Q&A for Individual Investors

- A booklet providing concise explanations on the securities taxation system for individual investors, with illustrations and figures, presented in a Q&A format.
  (111,000 copies published in FY17)

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2. Producing and Publishing Materials
(3) Free downloads offered at e-bookstores

Free downloads of “So Easy! Asset Management and Securities Investment Start Book” offered at 17 e-bookstores from February 2018 (2,388 downloads in FY17)

◆ List of e-bookstores

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<th>Amazon Kindle</th>
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<td>COCORO BOOKS</td>
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<td>BookLive!</td>
<td>Books Kinokuniya Webstore</td>
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<td>DMM e-Books</td>
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</tbody>
</table>

◆ Screenshot of e-bookstore (Kindle)
2. Producing and Publishing Materials  
(4) Electronic Book Apps

- Provided various publications in e-book application format
- Video clips such as “Start Today! Asset Management and Securities Investment” and “Answers to Your Securities Investment Questions in 5 Minutes” (for beginners and inexperienced investors) were also introduced

(6,347 downloads in FY17)
3. Seminars and Events
(1) First Time Asset Management Lecture

- Lectures for beginners and inexperienced investors on the basics of finance and securities (nature of financial products, necessity of life and money planning, risk and return, diversified investment, and long-term investment) held in all prefectures.
- 6,679 participants in 66 venues for FY17. (50 venues and 5,004 participants in FY16)

◆ Number of Participants

<table>
<thead>
<tr>
<th>Region</th>
<th>Number of Lectures</th>
<th>Seating Capacity</th>
<th>Applicants</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tokyo</td>
<td>18 venues, 32 lectures</td>
<td>2,160</td>
<td>3,178</td>
<td>2,261</td>
</tr>
<tr>
<td>Osaka</td>
<td>12 venues, 20 lectures</td>
<td>1,498</td>
<td>1,790</td>
<td>1,332</td>
</tr>
<tr>
<td>Nagoya</td>
<td>10 venues, 16 lectures</td>
<td>1,320</td>
<td>1,124</td>
<td>820</td>
</tr>
<tr>
<td>Hokkaido</td>
<td>1 venues, 2 lectures</td>
<td>100</td>
<td>156</td>
<td>112</td>
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<tr>
<td>Tohoku</td>
<td>6 venues, 12 lectures</td>
<td>640</td>
<td>540</td>
<td>417</td>
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<tr>
<td>Hokuriku</td>
<td>3 venues, 6 lectures</td>
<td>440</td>
<td>446</td>
<td>332</td>
</tr>
<tr>
<td>Chugoku</td>
<td>5 venues, 10 lectures</td>
<td>500</td>
<td>574</td>
<td>492</td>
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<tr>
<td>Shikoku</td>
<td>4 venues, 8 lectures</td>
<td>400</td>
<td>463</td>
<td>324</td>
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<tr>
<td>Kyushu</td>
<td>7 venues, 14 lectures</td>
<td>760</td>
<td>678</td>
<td>589</td>
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<tr>
<td>Total</td>
<td>66 venues, 120 lectures</td>
<td>7,818</td>
<td>8,949</td>
<td>6,679</td>
</tr>
</tbody>
</table>

* NISA/iDeCo lectures (6 lectures) and three targeted lectures (3 each for young and senior investors) offered in the three metropolitan areas (Tokyo, Nagoya, Osaka)

Program contents

[Basics: two 60 minute sessions]
First Steps toward Asset Management
(Basics of asset management, framework of financial products, risks and returns, etc.)

[Application: two 60 minute sessions]
Easier than I thought! The Basics of Investment
(Utilization of stocks, bonds, investment trusts, NISA, and defined contribution pensions, etc.)

[NISA and iDeCo Lecture: two 60 minute sessions]
Survivor’s Guide: the Basics of NISA and iDeCo
(How to select your first investment trust, etc.)

Basic texts (see p10)
3. Seminars and Events
(2) Securities Investment Day Events

- Events mainly targeting young investors (in their 20s and 30s) held across Japan around Securities Investment Day (October 4).
- Events were held at 29 venues in 9 regions with 2,662 participants in FY17. (20 venues in 9 regions with 5,073 participants in FY16)

◆ October 3, 2017 (Tuesday) Otemachi First Square Conference

Part 1
Lecture: “Thinking About Life Designs Through Fantasy Marriage Registrations”
Lecturer: Ayumu Ochiai (Researcher, Recruit Bridal Research Institute)

Part 2
Lecture: “So long as we have love, money doesn’t matter... or does it?
An encouragement of long-term, diversified ‘installment’ asset management”
Lecturer: Kensuke Morimoto (Senior Manager, Financial Literacy Support, Tokyo Stock Exchange, Inc.)
○ Participant Profile

**Gender**
- Male: 44.1%
- Female: 55.4%
- NA: 0.4%

**Age Group**
- (50s and younger)
  - FY17: 80.0%
  - FY16: 75.4%
- (FY16)
  - Male: 48.2%
  - Female: 51.8%

**Occupation**
- Corporate employee: 54.3%
- Housewife: 8.2%
- Part-time, casual: 10.9%
- Student: 1.3%
- Freelance: 1.4%
- Self-employed: 4.4%
- Public servant: 6.8%
- Unemployed: 10.8%
- Other: 1.1%
- NA: 0.9%

**Investment Experience**
- None: 50.6%
- Yes, currently: 40.4%
- Yes, in the past: 8.0%
- NA: 1.0%
- Less than 3 yrs: 47.9%
- 3 yrs +: 4.3%
- Other: 1.1%
Dispatched registered Finance/Securities Instructors free of charge to aid in employee training for public and private institutions, as well as to hold community lectures in civic halls around Japan to provide lectures on money planning, asset management, securities investment, and the Dollar-Cost Averaging NISA, etc.

152 venues and 357 lectures (12,948 participants) in FY17
(102 venues, 206 lectures, 7,740 participants in FY16)

[Key Lecture Sites]
Civic halls (59 institutions), training for public officials (50 institutions), training for employees of private corporations (20 institutions)

[Key Themes]
- Life planning (46 venues), asset management/investment planning (36 venues), defined contribution pension plans (including iDeCo) (31 venues), securities investment (21 venues)

(93 registered Finance/Securities Instructors as of the end of FY17)