



日本証券業協会
Japan Securities Dealers Association

Summary of Financial Literacy and Education Support Activities for FY2016

(April 2016 –End of March 2017)

Japan Securities Dealers Association



JSDA

日本証券業協会

Japan Securities Dealers Association

[Activities for Schools]

	Elementary School	Junior High School	High School	University
Developing and Providing Teaching Materials	<div>Let's Form a Stock Company! A Challenge from Mr. X *1</div> <div>FY16: 341 schools (33,622 participants) FY15: 317 schools (29,865 participants)</div>			
	<div>Three Doors to Understanding the Economy Let's Take a Voyage of Economic Discovery *1</div> <div>FY16: 348 schools (33,091 participants) FY15: 326 schools (29,982 participants)</div>			
	<div>Stock Learning Game</div> <div>FY16: 800 schools, 35,643 participants FY15: 875 schools, 39,936 participants</div>			
	<div>Stock Company System and Securities Market Framework (booklet)</div> <div>FY16: 10,851 copies FY15: 11,371 copies</div>			
Providing Information (elementary to high school teachers/ University students)	<div>Immersion: World of Economy for Everybody (new material) Distributed from April 2017</div>			
	<div>Summer Seminar for Teachers (9 locations) *3</div> <div>FY16: 551 participants FY15: 536 participants</div>			
	<div>Experience Finance and Securities Program (Tokyo/Osaka/Nagoya)</div> <div>FY16: 128 participants FY15: 125 participants</div>			
	<div>Mail Magazine for Teachers (new program)</div> <div>Number of registered users as of end of FY16: 1,818</div>			
PR for Schools	<div>Contents for Teaching License Renewal Lecture (under preparation, scheduled for distribution from Fall 2017)</div>			
	<div>"Rainbow News" information magazine for educators *1</div> <div>22,000 copies per issue (issued three times per year)</div>			
	<div>Website "Kinyukeizai Navi" *1</div> <div>FY16: 87,131 accesses FY15: 70,063 accesses</div>			
	<div>Personal Finance Seminar (Tokyo/Osaka/Nagoya) *4</div> <div>FY16: 240 participants FY15: 238 participants</div>			
Dispatch Lecturers for Schools	<div>Saturday Educational Activities</div> <div>FY16: 121 schools (238 classes, 7,147 participants) FY15: 87 schools (167 classes, 5,005 participants)</div>			
	<div>Financial Literacy Delivery Course</div> <div>FY16: 102 schools (185 classes, 12,200 participants) FY15: 69 schools (101 classes, 6,247 participants)</div>			
Support/ Collaboration	<div>Support for "Study Group on the Promotion of Financial and Economic Education" (Chaired by Naoyuki Yoshino)</div>			
	<div>Support for All-Japan Securities Study Student League</div>			
International Activities	<div>Participation in International Investor Education Activities</div>			

*1 Securities Knowledge Proliferation Project *2 Joint project with Tokyo Stock Exchange *3 Lecture text posted on JSDA website *4 Lecture video posted on JSDA website

Developing and Providing Teaching Materials (A Challenge from Mr. X)

(1) Developing and Providing Hands-On Teaching Materials

(i) 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 acquire basic knowledge on the structure, roles and social responsibility of stock companies, and the financial framework. The JSDA provides hands-on teaching materials mainly for junior high schools, involving planning a company business, procuring funding, and understanding business performance from economic news.
- Video clip for teachers explaining the class structure using the teaching materials is posted on the "Kinyukeizai Navi" website.
- In FY16, a total of 341 schools and 33,622 students used the materials.
(In FY15, a total of 317 schools and 29,865 students used the materials.)
- The program is conducted as part of the Securities Knowledge Proliferation Project.



◆ "Let's Form a Stock Company! A Challenge from Mr. X" Teaching Material Kit

◆ Video clip for teachers
<http://www.kinyu-navi.jp/textbook/contents8/index.html>

Developing and Providing Teaching Materials (Three Doors to Understanding the Economy)

(ii) Hands-on teaching material “Three Doors to Understanding the Economy: Let’s Take a Voyage of Economic Discovery” (for High School Students)

- This program focuses on “stock companies,” “direct and indirect financing,” and “mechanism of exchange rates, interest rates, and the economy,” aiming to raise awareness and deepen understanding by the students. Teaching materials for hands-on learning on each theme in one class (50 minutes) are provided mainly targeting high schools.
- Video clip for teachers explaining the class structure using the teaching materials is posted on the “Kinyukeizai Navi” website.
- In FY16, a total of 348 schools and 33,091 students used the materials.
(In FY15, a total of 326 schools and 29,982 students used the materials.)
- The program is conducted as part of the Securities Knowledge Proliferation Project.



◆ Three Doors to Understanding the Economy: Let’s Take a Voyage of Economic Discovery” teaching materials

◆ Video clip for teachers
<http://www.kinyu-navi.jp/textbook/contents9/index.html>

Developing and Providing Teaching Materials (Stock Market Game)

(2) Stock Learning Game

- JSDA provides stock trading simulation materials for mainly junior high, high school, and university students, to draw attention of the students to the developments in real economy and society which affects the stock price movements.
- In FY16, a total of 800 schools and 35,643 students participated.
(In FY15, a total of 875 schools and 39,936 students participated.)
- This program is provided jointly with the Tokyo Stock Exchange.



◆ "Stock Market Game" teaching materials



株式学習ゲーム
～株式で学ぶ経済の動き～

チーム用
売買日付: 2013年10月30日
学校名: JTH高校
チーム名: チームA協
チームID: A協/0017

取引結果一覧
Aコース 2013年10月29日現在

保有株式の状況を確認する

取引履歴

銘柄コード	銘柄名	売買	約定日	約定量	単価	金額	買値金額	売却金額
4001	OLC	買	10月28日	100	15,200	1,520,000	1,520,000	
8130	サンリオ	買	10月28日	200	5,540	1,108,000	1,108,000	

手続現金残高: 7,300,000

保有株式の状況

銘柄コード	銘柄名	保有量	現在値	評価額
4001	OLC	100	15,500	1,550,000
8130	サンリオ	200	5,430	1,086,000

時価評価額合計: 2,642,000
資産合計: 10,008,000

◆ "Stock Market Game" teaching materials and website
(<http://www.ssg.ne.jp/>)

(3) Financial and Securities Study Material: "Stock Company System and Securities Market Framework"

- JSDA provides a booklet that gives easy-to-understand explanation on the roles of stock company system and economic significance of stocks using many illustrations. It mainly targets high schools, and is to be used as a teaching aid for learning about the economy and stocks.
- In response to requests from schools, 10,851 booklets were provided in FY16. (11,371 booklets in FY15.)



◆ Finance and securities study materials

(4) Immersion! World of Economy for Everybody

- Newly prepared in FY16, picking up seven key phrases related to finance and securities appearing in junior high school social studies and high school civics and home economy textbooks, to deepen the students' understanding on finance and securities and promote their interest.
Being offered from FY17.
- Seven key phrases are divided into two "Basics" and "Application" class works, with a total of 14 class works can be used as part of a class (within 20 minutes), watching NHK television clips recorded in the accompanying DVD.

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



◆ "Immersion! World of Economy for Everybody" Themes

◆ "Immersion! World of Economy for Everybody" Workbook

Providing Information (Summer Seminar for Teachers)

(1) Seminars for Teachers

(i) Summer Seminar for Teachers

- The seminar targets junior high and high school social studies and civics teachers, aiming to provide timely information on recent trends and issues in the economy and financial and capital markets, in tune with the instruction 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 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.
- In FY16, nine events were held at nine venues in major cities between late July and mid-August, with 551 participants.
(In FY15, nine events were held at nine venues between late July and mid-August, with 536 participants.)
- Transcripts of some of the lectures from the seminars are published on the JSDA website.



◆ Lecture



◆ Field trip to a company

(ii) Experience Finance and Securities Program for Teachers

- JSDA holds “Experience Finance and Securities Program for Teachers” for elementary, junior high and high school teachers interested in securities, regardless of their specialized subjects. The purpose of the program is to deepen their understanding of the stock company system and securities market through lectures on the basics of securities, study of teaching materials provided by JSDA, and observation tours to stock exchanges.
- In FY16, the program was held on August 17th (Tuesday) and 18th (Wednesday) in Tokyo, December 26th (Monday) in Nagoya, and March 28th (Tuesday) in Osaka.
- Number of participants were 60, 37, and 31 in Tokyo, Nagoya, and Osaka, respectively, with a total of 128.
(For FY15, 37, 40, and 48 in Tokyo, Nagoya, and Osaka, respectively.)



◆ Lecture



◆ Field trip to a company

(2) Mail magazine for teachers: "Finance and Economy in 5 minutes"

- Started distribution of a mail magazine that provides explanation, basic knowledge and tips on teaching classes on economy/finance/securities related topics or teachers who have difficulty teaching finance and economy from February 2017.
- Number of registered users as of end of March 2017 was 1,818.
- Weekly distribution focusing on one of the three following themes:

<Topics>

(1) "Now I get it! The economy news"

Fun explanation of news topics that may be interesting to students from economics and finance perspectives.

(2) "My surefire topic for making classes interesting"

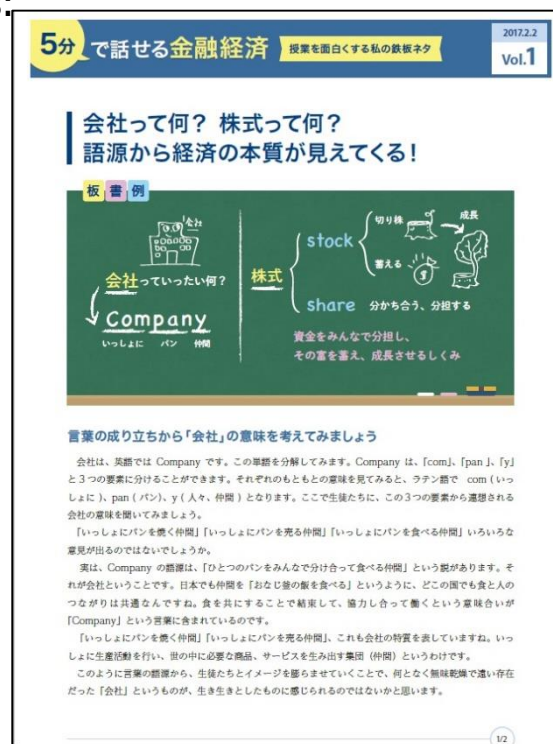
Introducing the infallible class topics by university professors, working teachers and economists.

(3) "Useful finance bits"

Explanation on knowledge that could also be useful for teachers, including financial terms, latest financial systems products.

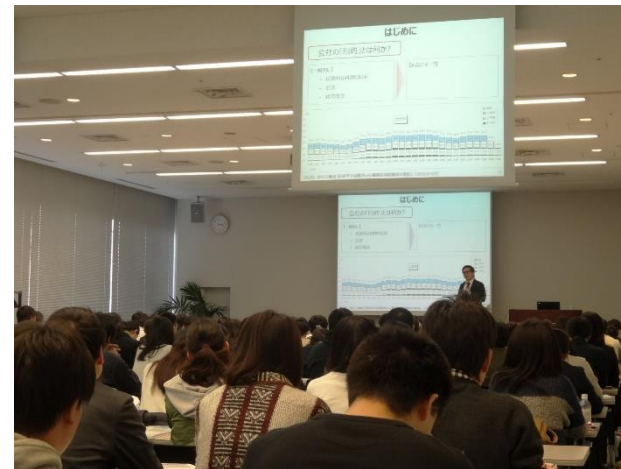
E-mail magazine information:

http://www.jsda.or.jp/manabu/web_curriculum/mailmagazine.html



(i) Personal Finance Seminar for University Students

- JSDA hosts “Personal Finance Seminar for University Students” for the purpose of enhancing their financial literacy and enabling them to become independent members of society by learning about personal finance, as well as basics of economy/finance and asset management.
- In FY16, seminars were held on February 27th, March 3rd, and 8th in Tokyo, Osaka, and Nagoya, respectively, with a total of 240 participants.
(In FY15, seminars were held on December 6th, 19th, and 20th in Tokyo, Osaka, and Nagoya, respectively, with a total of 238 participants.)



◆ Lecture

(1) “Rainbow News” information magazine for teachers

- The Project provides an information magazine for teachers to promote the need for education on finance and economy, and the effectiveness of the teaching materials provided.
- The magazine is issued three times a year, and delivered to junior high and high schools across Japan, as well as to the Boards of Education (22,000 copies per issue).
- The magazine features interviews concerning education on finance and economy, economic topics, and case studies on hands-on teaching materials. The contents including back numbers are published on the “Kinyukeizai Navi” website.
(<http://kinyu-navi.jp/textbook/contents4/index.html>)
- The program is conducted as part of the Securities Knowledge Proliferation Project.



◆ “Rainbow News”
Cover (Issue No.33)

(2) “Kinyukeizai Navi” website (<http://www.kinyu-navi.jp/>)

- As part of the Securities Knowledge Proliferation Project, “Kinyukeizai Navi” website is provided for education on finance and economy, targeting junior high and high school teachers and students.
- For students, the contents include “Let’s Learn! Finance and Economics” (comics and quiz-based courses on basic knowledge) and “Walking in the Finance District” (explanation of various schools), and “Hot Blooded! The Economist Family” video.
- For teachers, there are guidelines on incorporating the above teaching materials to classes, and information on teaching materials and events provided by the Project.
- In FY16, there were 87,131 accesses.
(70,063 accesses in FY15)
- The program is conducted as part of the Securities Knowledge Proliferation Project.



◆ “Kinyukeizai Navi”

Dispatch Lecturers for Schools (classes delivered to elementary/junior high/high schools)

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

- As part of efforts to further financial and economic education, JSDA conducts classes using "Challenge! Snack Co., Ltd.," a study program that teaches students about the mechanism of a stock company through developing products for a confectionery company and financing its operations.
- The lecturers are officers and employees of the JSDA.
- In FY16, 238 lectures were given at 121 elementary/junior high/high schools, with 7,147 participants.

	FY16			FY15		
	121 schools	* 238 classes	(7,147 participants)	81 schools	* 160 classes	(4,797 participants)
	*89 elementary schools, 9 junior high schools, 9 high schools, and 14 others			*68 elementary schools, 3 junior high schools, 5 high schools, and 5 others		
Saturday Classes	51 schools	118 classes	(3,472 participants)	48 schools	103 classes	(3,160 participants)
Saturday Educational Activities	3 schools	3 classes	(78 participants)	12 schools	14 classes	(290 participants)
Weekday Classes	53 schools	97 classes	(2,904 participants)	21 schools	43 classes	(1,347 participants)
Other	14 schools	20 classes	(693 participants)			

<Activity Formats>

Saturday Classes: Classes are held for all pupils/students, mainly sponsored by the schools as part of the regular curriculum.

Saturday Educational Activities: Classes are held for pupils/students in the area who wish to participate, mainly sponsored by entities other than the schools (PTA, education supporters, etc.).

Weekday Classes: Above activities held on weekdays.

Other: Events for children sponsored by MEXT, Finance Bureau, and Civic Halls, etc.



◆ "Challenge! Snack Co., Ltd." workbook



◆ Classroom study

◆ Students' work



Dispatch Lecturers for Schools (classes delivered to elementary/junior high/high schools)

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

- "Challenge!! Snack Co., Ltd." was included as one of the 17 examples in "Sample Cases of Educational Activities by Private Sector Companies/Organizations for Promoting Cooperation/Collaboration between Community and Schools" on MEXT Lifelong Learning Policy Bureau.



◆ Article on Sample Cases

- Tokyo Metropolitan Government Board of Education also referred to "Challenge!! Snack Co., Ltd." in the FY16 "Report on 'Interactive Lectures by Corporations, etc.'"



◆ Article on the Report

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

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

- JSDA dispatches lecturers to universities on the topic of financial literacy and roles of securities markets/companies. The purpose of the program is to teach university students the basics of economics, finance, and asset management and deepen their understanding of the securities business and the role of securities market.
- The lecturers are officers and employees of the JSDA.
- In FY16, lecturers were dispatched for a total of 185 classes in 102 universities, with 12,200 participants.

	FY16	FY15
	185 Lectures at 102 universities (12,200)	101 Lectures at 69 universities (6,247)
Financial Literacy	115 Lectures at 74 universities	64 Lectures at 49 universities
Securities Market/Securities Industry	70 Lectures at 48 Universities	37 Lectures at 31 universities

* Total number of universities do not agree as some lectures covered both topics



◆ “Financial Literacy ‘Home Delivery’ Lecture” leaflet

◆ Lecture

(1) Support for “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.
- “Subcommittee for Improving University Students’ Financial Literacy” (Chair: Professor Nobuyoshi Yamori, Research Institute for Economics & Business Administration, Kobe University) discusses specific methods, etc. for improving university students’ financial literacy. Prepared and published “Financial Literacy Education: Case Studies from 10 Universities” in March 2017.



◆ “Financial Literacy Education: Case Studies from 10 Universities”

(2) Support for All-Japan Securities Study Student League Activities

- JSDA provides ongoing support for the activities of the national body of university student securities study circles, the All-Japan Securities Study Student League.
- JSDA supports the “Securities Seminar Convention,” which is held annually in December with university circles from around Japan invited to discuss various topics related to securities; as well as spring and fall seminars held by the regional leagues (Tokyo, Osaka, and Nagoya).
- In FY16, the “Securities Seminar Convention” was held on December 8th (Thursday) and 9th (Friday) at the National Olympics Memorial Youth Center in Tokyo, with 491 students from 30 universities participating.
(In FY14, a total of 33 universities and 583 students participated.)



◆ Securities Seminar Convention



JSDA

日本証券業協会

Japan Securities Dealers Association

[Activities for General Public]

	Young Professionals	General Professionals	Senior Citizens
Providing Website Contents, etc.	<div>Shellfish Workers' "INVEST TO THE FUTURE" app promotion videos</div> <div>"Hamakan" Investment Management Theater</div> <div>Start Today! Asset Management and Securities Investment</div> <div>Learn with Video! Easy to Learn Securities Investment Basic Knowledge</div> <div>Finally starting! Junior NISA NISA system brings value to everybody</div> <div>Web Comic (2 series, 5 episodes, 1 column)</div> <div>Electronic Book App</div>	<div>FY16: 1,297,129 accesses FY15 (launched in March 11): 30,015 accesses</div> <div>FY16: 56,791 accesses FY15: 33,849 accesses</div> <div>FY16 (from March 31): 289 accesses</div> <div>FY16: 39,018 accesses FY15: 34,613 accesses</div> <div>FY16: 20,604 accesses FY15 (from March 11): 4,318</div> <div>FY16: 37,861 accesses FY15 (from March 4): 23,307</div> <div>FY16: 4,715 downloads FY15: 5,886 downloads</div>	*Figures indicate the aggregated total number of web page views and YouTube views.
Producing and Publishing Materials	<div>Asset Management and Securities Investment Start Book (Issued Aug 2016)</div> <div>"Introduction to Defined Contribution Pension Plans"</div> <div>"Securities Tax System Q&A for Individual Investors"</div> <div>"Guide to Securities Tax System"</div>	<div>Start Book: FY16, 48,000 copies "Introduction to Investment (Basic Guide for Securities Investment)" FY15: 20,000 copies "First Time! Asset Management" FY15: 15,000 copies</div> <div>FY16: 13,000 copies, FY15: 5,500 copies</div> <div>FY16: 113,000 copies, FY15: 124,000 copies</div> <div>FY16: 8,000 copies, FY15: 11,000 copies</div>	
Sponsoring Seminars & Events	<div>First Time Asset Management Lecture (Note) Offered as "Financial Literacy Lecture" in FY15</div> <div>For Young Investors FY16: 188 participants (3 venues) FY15: 252 participants (2 venues)</div> <div>Promoting Activities for "Investment Day"</div>	<div>FY16: 4,604 participants (44 venues, 86 lectures) FY15: 613 participants (15 venues)</div> <div>FY16: 5,073 participants (20 venues) FY15: 4,117 participants (21 venues)</div>	<div>For Senior Investors FY16: 212 participants (3 venues) FY15: 132 participants (1 venue)</div>
Dispatch Lecturers	Dispatch Lecturers for General Public (Integrated lecturer dispatch business in July with the centralization of APROSIS business) FY16: 102 institutions, 206 lectures (7,740 participants)		

Providing Web Contents, etc. (Summary of “Manabu (education)” page)

(1) Summary of “Manabu (education)” page

- Established “Manabu (education)” page on JSDA website to provide various contents.
- Available contents includes information for people interested in learning about investments, and those targeting teachers/educators, as well as university and graduate students.



(2) Production of Web comics contents

- Targeting young professionals, three web comic strips were posted on the portal site "woman.mynavi.jp" and guiding ads started in March 2017 for the purpose of promoting the significance of life planning/money planning and asset management, as well as understanding of various financial products.

Title		Theme	Viewing period	March 30 to April 26 ,2017 *Kept in archive after the period
Episode 1.	Apartment 104: Makeover of Mr. Pretentious	<ul style="list-style-type: none"> Significance of life planning/money planning Key life events and related expenses 	PV during viewing period	84,388 PV (Target: 80,000 PV)
Episode 2.	Apartment 213: Ms. Hungry's "cake" making	<ul style="list-style-type: none"> Significance of stock investment 		
Episode 3.	Apartment 315: Solidarity! The Aloha family	<ul style="list-style-type: none"> Education expense/cost of living in retirement Risk of investment, diversified investments Investment trusts 		



◆ Web comics



ショーケンさんの
投資の極意
その1

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。
私も昔は人生とかお金のことをちゃんと考えていなかったけど、奥さんと出会ってからは
理想のライフプランを考えて色々頑張ったものだよ。

結婚費用の目安	結婚式や両家贈り合わせ、 婚約・結婚指輪などの費用 81.4万円	挙式・披露宴などの費用 352.7万円	新婚旅行などの費用 72.3万円
※各項目の金額は、費用が発生した人の平均額であり、各項目の平均金額の合計は総額とは一致しない。			
総額 460.7万円			
※出展・リクルートマーケティングパートナーズ「ゼクシィ結婚トレンド調査2015調べ」			
マイホーム購入時	マンション 平均購入価格4,249.7万円 889.3万円	建売住宅 平均購入価格3,319.5万円 409.4万円	土地付注文住宅 平均購入価格3,897.9万円 497.3万円
※出展・住宅金融支援機構「2015年度フラット35利用者調査」			

◆ Columns at the end of web comics



- ◆ Guiding ads for web comics
 - Ameba in-feed ads
 - AkaNe in-feed distribution

(3) Revised video contents ("Hamakan" Investment Management Theater)

- Video contents "Hamakan" Investment Management Theater was produced and released in July 2014, mainly targeting beginners and young investors to promote understanding on basics of asset management and stocks, etc. in a fun and easy way.
- In light of the launch of Junior NISA and expansion of qualification for individual defined contribution pension plan, revised video contents were produced and released in March 2017, along with online advertisement.



◆ Special site



◆ Video



◆ Sample online ad
◆ Shellfish Worker Twitter

<http://www.jsda.or.jp/manabu/shisan/index.html>

Producing and Publishing Materials (for beginners and inexperienced investors)

(1) "So easy! Asset Management and Securities Investment Start Book" issued

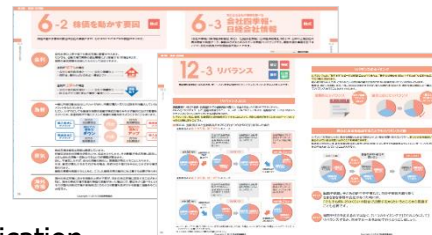
- A beginner's guide providing explanation on importance of life planning/money planning; preparing for securities investment; features of various products including stocks, investment trusts and bonds; basic knowledge on specific information gathering and what they mean; and explanation on the NISA and Junior NISA system, published in August 2016.



◆ Cover



◆ Outline



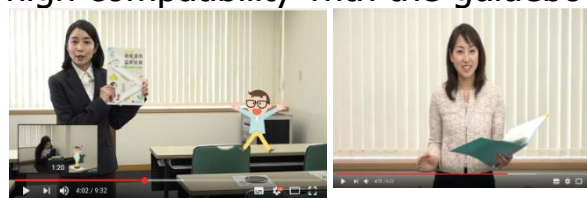
◆ Application

(2) Produced video contents (Start Today! Asset Management and Securities Investment)

- To provide further opportunity to learn with the new publication "Asset Management and Securities Investment Start Book," video content "Start Today! Asset Management and Securities Investment" was produced, offering high compatibility with the guidebook. Released in March 2017.



◆ Special site



1/15 0321



◆ Video

- ◆ Four new video clips and prologue





Prologue: association with the guidebook, introduction
Episode 1: "What is asset management?" Appeal the need for asset management

Episode 2: "What are financial products?" Promote understanding on concepts of risk and return

Episode 3: "What are three features of financial products?" Explain product features for stocks, bonds and investment trusts

Episode 4: "What are the basics of investment?" Appeal the need for diversified investment

Producing and Publishing Materials (for beginners and inexperienced investors)

Types of Publications (Edition/Format)		Production Volume	
		(FY16)	(FY 15)
 <p>(1) "Asset Management and Securities Investment Start Book" Prepared by integrating the existing booklet "First Time! Asset Management" and "Introduction to Investment." A beginner's guide providing explanation on 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 and Junior NISA system (First edition/ A4, 90 pages)</p>		48,000 copies	<p>"First Time! Asset management" 15,000 copies</p> <p>"Introduction to Investment" 20,000 copies</p>
 <p>(2) "Introduction to Defined Contribution Pension Plans" A beginner's guide providing simple explanation on the mechanism, features and points of notice concerning the defined benefits pension system. (Fourth edition/ A4, 20 pages)</p>		13,000 copies	Not available in FY15.
 <p>(3) "Securities Tax System Q&A for Individual Investors" A booklet providing concise explanation on securities taxation system for individual investors, with illustrations and figures using a Q&A format. (FY16 version/ A4, 24 pages)</p>		113,000 copies	124,000 copies
 <p>(4) "Guide to Securities Tax System" A booklet providing detailed explanation on securities taxation system for individual investors, using figures and Q&A. (FY16 version/ B5, 160 pages)</p>		8,000 copies	11,000 copies

(3) Electronic Book App

- Providing various publications in e-book application format.
- In addition to the "Special site for the Investment Day annual events", video contents including "Shellfish Workers' INVEST TO THE FUTURE" and "Hamakan" Investment Management Theater" (for beginners and inexperienced persons)" are being offered.



◆ App screen (iPad)



- ◆ App promotion (made in collaboration with "Shellfish Workers" production service)

(1) First Time Asset Management Lecture (formerly “Financial Literacy Study Courses”)

- Delivered lectures for beginners and inexperienced persons on basic knowledge on finance and security across the country in cooperation with regional JSDA members and related organizations, etc.
- In FY16, lectures were held at 50 venues with 5,004 participants.
(In FY15, the lectures were held as Financial Literacy Study Courses at 15 venues with 613 participants.)

◆ Number of Participants

Region	Number of Lectures	Seating Capacity	Applicants	Participants
Tokyo	15 venues, 26 lectures	1,700	2,062	1,545
Osaka	9 venues, 16 lectures	1,040	1,145	841
Nagoya	7 venues, 12 lectures	960	1,099	875
Hokkaido	1 venues, 2 lectures	100	158	125
Tohoku	5 venues, 10 lectures	620	628	557
Hokuriku	2 venues, 4 lectures	320	170	138
Chugoku	4 venues, 8 lectures	520	608	456
Shikoku	3 venues, 6 lectures	300	336	272
Kyushu	4 venues, 8 lectures	400	231	195
Total	50 venues, 92 lectures	5,960	6,437	5,004

* Includes lectures for younger people, senior citizens, and on defined contribution retirement plans



◆ Lecture



◆ Distributed basics textbook “Asset Management and Securities Investment Start Book”

(1) “Investment Day” Events (Regional Lectures, Talk Shows, etc.)

- Nationwide events and seminars are held around the “Investment Day” on October 4th, to promote and enlighten the public about financial and securities knowledge and to enhance financial literacy. In FY16, a symbolic event held at the Tokyo International Forum to commemorate the 20th anniversary of “Investment Day.” (The program is conducted as part of the Securities Knowledge Proliferation Project.)
- In FY16, events were held at 20 venues in 9 areas across the country with 5,073 participants. (In FY15, events were held at 21 venues in 9 areas across the country with 4,117 participants.)



◆ October 4, 2016 (Tuesday) at Tokyo International Forum

(Top photo)

Lecture: “Future of Japan and our investments”

Lecturer: Professor Motoshige Itoh (Professor Emeritus, University of Tokyo; Professor, Faculty of International Social Sciences, Gakushuin University)

(Bottom photo)

“Eureka! How Japan can change with financial literacy (knowledge/decision making abilities)!”

Panelists:

Professor Motoshige Itoh (Professor Emeritus, University of Tokyo; Professor, Faculty of International Social Sciences, Gakushuin University)

Masumi Sai (Macroeconomist; External Director, Avon Products Co., Ltd.)

Packun Mackun (Comedians)

Moderator: Soichiro Tahara (Journalist)



26

Hosting and Promoting "Investment Day" Annual Event Activities

(4) "Investment Day" Annual Event Special Website



講演者や代表者等へ聞く「投資の魅力」！
一言メッセージ

「投資の日」は2020年を記念し、金融庁と大手証券会社の、著名な投資家の皆様、証券会社・金融機関の代表者等に「投資の魅力」をスピーチ、一言で聞いていただきます。

※ 掲載は、写真撮影時のものを掲載しております。
※ 敬称は省略させていただきます。



講演者や代表者等へ聞く「投資の魅力」！

一言メッセージ



[Special Website Contents]

- "Save" and "Protect" with investment: For new graduates and married couples (video)
- "Appeals of Investment": Short messages
- Information on events held around the country
- Seminars held at securities companies and financial institutions
- Let's challenge! "Investment Day" quiz, 20th anniversary version
- NISA special site information
- YOU (Tokyo Stock Exchange) introduction

Hosting and Promoting “Investment Day” Annual Event Activities

(6) Collaboration with JSDA Members

(i) Distribution of special Toushi-kun clear files

- To promote October 4th as the “Investment Day” to people visiting the JSDA member branch offices and the officers and employees of JSDA members, special clear file was produced for distribution by the JSDA members.
- 173 companies (119 members, 54 special members), 251,900 files

(ii) Business Trip by Toushi-kun, etc.

- During the “Investment Day” event period (September to November), Toushi-kun body suit and campaign banners were made available for hire to JSDA members.
- 7 companies (7 trips for 5 members, 2 trips for 2 special members)

(iii) Link-Banner to “Investment Day” Annual Event Special Website

- Display of “Investment Day” banner on JSDA members’ websites.
- 57 companies (49 members, 8 special member)

(iv) “Investment Day” Title Sponsorship Seminars

- Seminars held during the “Investment Day” event period (September to November) at headquarters and branch offices of JSDA members to have “Investment Day” titles.
- 10 companies (8 members, 2 special member)

(v) Distribution of Leaflets at Events (Regional Venues)

- Distribute leaflets for nearby venues at JSDA offices, and headquarters and branch offices in the area



◆ Clear File



◆ Toushi-kun body suit

(1) Dispatch Lecturers for General Public/Adults

- In July 2016, finance/securities instructor system was established in conjunction with the integration with APROSIS (an NPO) business, to enhance lecturer dispatch business for the public to teach the basics of asset management and securities investment, etc.
- To promote recognition of the new business, PR activities were conducted through visits, magazines for HR and General Affairs personnel, and online.

FY16
102 institutions, 206 classes (7,740 participants)

[Number of Registered Finance/Securities Instructors (as of end of March 2017)]

- 85 (55 male, 30 female)

[Key Lecture Sites]

- Civic halls (Lifelong Learning Department) (43 institutions), public official training (32 institutions), private corporations training (8 institutions)

[Key Themes]

- Summary of defined contribution retirement plans (31 institutions), basics of asset management (26 institutions), basics of stock investment (24 institutions), basics of securities investment (16 institutions)

[New Participant Cultivation]

- Visited following municipal institutions to cultivate new participants:
Mutual Aid Association of Prefectural Government Personnel, Prefectural Police Headquarters, Mutual Aid Association of Local Government Personnel, Mutual Aid Association of Public School Teachers, etc.
- Information sent to:
Public offices, private sector corporations, consumer centers, Lifelong Learning Departments, etc.



(Gekkan Soumu, March Edition)



JSDA

日本証券業協会

Japan Securities Dealers Association

[Other Activities]

(1) Participation in International Forum for Investor Education

- As a member of the International Forum for Investor Education (IFIE), JSDA representatives participate in meetings held by the Forum and proactively exchange information with representatives of the other countries. Since fiscal year ended March 2015, JSDA has been serving as the Chair of the IFIE Asia Chapter.
- In June 2016, JSDA participated in the panel discussion at the IFIE-IOSCO Investor Education International Conference held in Istanbul, Turkey, and introduced our commitment to improving financial literacy. JSDA also served as the Chair for the Asia Chapter Annual General Meeting held at the same time.
- In November 2016, JSDA served as the Chair for the interim meeting of the Asia Chapter held in Manila, Philippines.



◆ Conference



◆ Introductory video on US Financial Industry Regulatory Authority (FINRA)

III. Implications for FC/IE (1)

1. FC/IE across generations is now more important to promote financial literacy and support long-term asset accumulation

- Under the basic strategies:
 - "Minimum level of financial literacy to be attained"
 - "Financial literacy map"

1) For elementary, junior high, high and university students:

- school curriculum finance

2) For adults, working

- guidance on long life plan
- dissemination of

◆ JSDA Activities



Ki-ju: Age of Joy --

Another name for 77 years of age

FC/IE should be an effective tool for realizing a society where people really enjoy their longevity.