



日本証券業協会
Japan Securities Dealers Association

Summary of Financial Literacy and Education Support Activities for FY2018

(April 2018 – End of March 2019)





日本証券業協会
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Summary of Financial Literacy and Education Support Activities for FY2018 (Activities for Schools)



	Elementary School	Junior High School	High School	University
Developing and Providing Teaching Materials	Let's Form a Stock Company! A Challenge from Mr. X FY18: 355 institutions, 35,255 participants FY17: 309 institutions, 31,458 participants			
	Three Doors to Understanding the Economy Let's Take a Voyage of Economic Discovery FY18: 317 institutions, 29,722 participants FY17: 292 institutions, 28,524 participants			
	Immersion! The Economic World for Everybody FY18: 187 institutions, 13,837 participants FY17: 67 institutions, 5,394 participants			
	Stock Learning Game FY18: 810 institutions, 41,178 participants FY17: 825 institutions, 42,278 participants			
	Stock Company System and Securities Market Framework FY18: 10,770 copies, FY17: 7,918 copies			
Providing Information for Educators and Schools	Seminar for Teachers FY18: 512 participants (10 venues in Japan) FY17: 477 participants (8 venues in Japan)			
	Experience Finance and Securities Program FY18: 140 participants (Tokyo/Osaka/Nagoya) FY17: 139 participants (Tokyo/Osaka/Nagoya)			
	E-mail newsletter for educators FY18: 3,500 subscribers (as of end of FY) FY17: 2,505 subscribers (as of end of FY)			
	Website "Kinyukeizai Navi" FY18: 152,745 accesses FY17: 149,419 accesses			
	"Rainbow News" information magazine for educators 21,000 copies per issue (3 p.a.)			
	Teaching Certificate Renewal Course Materials FY18: 756 participants, FY17: 147 participants			
Dispatching Lecturers for Schools	Visiting Lectures (Saturday Educational Activities, etc.) FY18: 138 institutions (293 classes, 9,192 participants) FY17: 141 institutions (297 classes, 9,204 participants)			Visiting Lectures FY18: 127 institutions (236 classes, 15,472 participants) FY17: 121 institutions (220 classes, 13,785 participants)
Offering Support/ Collaboration	Support for "Study Group on the Promotion of Financial and Economic Education" (Chaired by Naoyuki Yoshino)			Support for All-Japan Securities Study Student League FY18: 32 universities, 50 organizations, 646 participants FY17: 31 universities, 45 organizations, 552 participants)
Global Activity	Participation in International Investor Education Activities			

1. Developing and Providing Teaching Materials

(1) Hands-on teaching material "A Challenge from Mr. X"

(1) Hands-on teaching material "Let's Form a Stock Company! A Challenge from Mr. X" (for junior high and high school students)

- The purpose of this hands-on teaching material is to deepen understanding of the structure, roles and social responsibility, etc. of stock companies as well as how finance works. Provided free of charge to interested institutions.
 - Classes are conducted largely through group work, where students are asked to think about planning and funding for a company, or discuss the impacts of economic news on corporate performance.
- Teaching materials were used by 35,255 students in 355 institutions across Japan in FY18. (31,458 students in 309 institutions across Japan in FY17)

* About 210,000 students in 2,200 institutions in total have used the material since it was first provided in FY12.
[Securities Knowledge Proliferation Project]

◆ Teaching Material Kit



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

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

1. Developing and Providing Teaching Materials

(2) Hands-on teaching material "Three Doors to Understanding the Economy"

(2) Hands-on teaching material "Three Doors to Understanding the Economy: Let's Take a Voyage of Economic Discovery" (for junior high and high school students)

- The purpose of the hands-on teaching material is to deepen understanding about the economy and the basic structure of the financial framework, and to promote thoughts on current affairs based on acquired knowledge. Provided free of charge to interested institutions.
 - Class is conducted by facilitating thoughts by students through group work on three themes, i.e., "stock companies," "direct and indirect financing," and "framework for foreign exchange, interest rates, and the economy" (one theme per 50-minute class)
- Teaching materials were used by 29,722 students in 317 institutions across Japan in FY18 (28,524 students in 292 institutions across Japan in FY17)
- * About 180,000 students in 1,900 institutions in total have used the material since it was first provided in FY13. [Securities knowledge Proliferation Project]

◆ Teaching Material Kit



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

◆ Video clip for teachers

<http://www.kinyu-navi.jp/textbook/contents9/index.html>

1. Developing and Providing Teaching Materials

(3) "Immersion! The Economic World For Everybody"

(3) "Immersion! World of Economy for Everybody"

- The purpose of the material is to deepen knowledge on finance, economy and society through discussion after viewing a recorded NHK television program. Provided free of charge to interested institutions.
 - Class on seven key phrases appearing in junior high and high school civics and home economics textbooks can be conducted using part of a session (within 20 minutes).
- Teaching materials were used by 13,837 students in 187 institutions across Japan in FY18. (5,394 students in 67 institutions across Japan in FY17)
- * About 20,000 students in 250 institutions in total have used the material since it was first provided in FY17.

◆ Teaching Material Kit



◆ 7 Key Phrases

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

◆ Workbook



1. Developing and Providing Teaching Materials

(4) "Stock Learning Game"

(4) Stock Learning Game

- The purpose of the simulation teaching material is to study actual movements in economy and society that cause changes in share prices through simulated stock trading at school classes, etc. The simulation materials mainly targeting junior high school to university students are provided free of charge to interested institutions.
- 41,178 students in 810 institutions across Japan participated in FY18.
(42,278 students in 825 institutions in FY17)

* About 1,040,000 students in 21,500 institutions in total have used the materials since it was first provided in FY95.

[Joint project with the Tokyo Stock Exchange]

◆ Teaching Material Kit



◆ Website

(<http://www.ssg.ne.jp/>)

株式学習ゲーム
株式で学ぶ経済の動き

チーム用メニュー
 売買日付: 2013年10月30日
 学校名: JTK高校
 チーム名: チームA協
 チーム用メニュー
 売買データ入力
 注文確認・変更
 取引結果一覧
 チーム順位表

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
 Aコース/チームA協/0017
 2013年10月29日現在
 単位:円

銘柄コード	銘柄名	売買	約定日	株数	単価	金額	買値金額	エラー
4001	OLC	買	10月28日	100	15,280	1,528,000	1,528,000	
8135	サンリオ	買	10月28日	200	5,540	1,108,000	1,108,000	
手持現金残高							7,366,000	

b. 保有株式の状況

銘柄コード	銘柄名	保有数	現在値	評価額
4001	OLC	100	15,560	1,556,000
8135	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

1. Developing and Providing Teaching Materials

(5) "Stock Company System and Securities Market Framework"

(5) 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, etc. using illustrations mainly targeting high schools are provided free of charge to interested institutions.
- 10,770 copies were provided in FY18 (7,918 copies in FY17)

◆ Teaching Material



2. Providing Information for Teachers and Schools

(1) Seminars for Teachers

(1) Seminar for Teachers

(i) Seminars for teachers (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, as well as on the hands-on teaching materials provided by JSDA.
 - The program includes lectures by experts on the themes teachers are interested in, as well as workshops utilizing hands-on teaching materials, 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, etc.
 - Held with the support of the boards of education of 47 prefectures
- 512 participants at 10 venues across Japan in FY18
(477 participants at 8 venues across Japan in FY17)
- Transcripts of some of the lectures from the seminars are published on the JSDA website.

◆ Lectures/ Observation tours



(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. Held in Tokyo (August), Osaka (December), and Nagoya (December)
 - Lectures on the basics of securities, workshops on teaching materials, observational tour of stock exchange, etc.
- Total of 140 participants (48 in Tokyo, 45 in Nagoya, and 47 in Osaka) in FY18
(Total of 139 participants in FY17: 57 in Tokyo, 45 in Nagoya, and 37 in Osaka)



2. Providing Information for Teachers and Schools

(2) E-mail newsletter for educators

(2) E-mail newsletter for educators: "Finance and Economy in 5 minutes"

- An e-mail newsletter that provides explanations, basic knowledge, and tips on teaching classes on economy/finance/securities related topics with sample blackboard scripts is distributed three times each month
 - Written by experts in finance/economics and finance/economics education (economists, university professors, FPs)
- 3,500 subscribers as of end March 2019 (2,505 subscribers as of end March 2018)

◆ Topics

- ✓ **"Now I Get It! The Economy News"**
Fun explanation of news topics that may be interested to students of economics and finance
- ✓ **"My Surefire Topic to Make Classes Interesting"**
Introducing the infallible class topics by experts in various areas
- ✓ **"Useful Finance FYI"**
Explanation on knowledge that could also be useful for teachers, including financial terms, latest financial systems and products, etc.



E-mail newsletter information: http://www.jsda.or.jp/gakusyu/edu/web_curriculum/mailmagazine.html

2. Providing Information for Teachers and Schools

(3) “Kinyukeizai Navi” website

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

- This website was established primarily for teachers and students of junior high and high schools, to allow them a platform on which they can learn the basics of securities and finance through their computers or smartphones
- The website includes information on teaching materials and events (e.g. seminars for educators) provided by the Securities Knowledge Proliferation Project, as well as the following
 - “Clear-Cut Economy News” (commentary on monthly news in conversational format)
 - “Let’s Learn! Finance and Economics” (comics and quiz-based courses on basic knowledge)
 - “Walking in the Finance District” (illustrated explanation of various financial institutions)
 - “Hot Blooded! The Economist Family!!” video (short video clip on a family resolving the mysteries of financial and economic frameworks)

152,745 page views in FY18 (149,419 page views in FY17)

[Securities Knowledge Proliferation Project]



2. Providing Information for Educators and Schools

(4) "Rainbow News" information magazine

(4) "Rainbow News" information magazine for educators

- This is an information magazine aimed at a wide range of educators to promote education on finance and the economy. Sent to junior high and high schools, as well as the boards of education across Japan, three times a year (21,000 copies for each issue)
 - 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
 - Introduction of events by Securities Knowledge Proliferation Project related organizations
- The current issue and back issues are posted on "Kinyukeizai Navi" website (<http://kinyu-navi.jp/textbook/contents4/index.html>)

[Securities Knowledge Proliferation Project]



◆ Rainbow News
(Vol. 37)



3. Dispatching Lecturers for Schools

(1) Dispatching Lecturers to elementary/junior high/high schools

(1) Visiting lectures at elementary/junior high/high schools (Saturday Classes)

◆ Class

- Participation in “Saturday Study Volunteer Support” initiative by Ministry of Education, Culture, Sports, Science and Technology in 2014 led to the visiting lectures program which dispatches lecturers for classes in elementary, junior high, and high schools across Japan as part of efforts to enhance and promote financial and economic education, with the cooperation of the officers and employees of JSDA members
- Lectures (2 X 45 minutes) feature the hands-on learning program “Challenge! Snack Co., Ltd.” focusing mainly on the stock company structure, as well as lectures on the basic knowledge of the securities market and financial literacy
- The lecturers are employees and members of JSDA (37 companies) and registered finance/securities instructors
- Lecturers were dispatched to 138 institutions (293 classes) with 9,192 pupils/students in FY18



◆ Student work projects



	FY18			FY17		
	*138 institutions	293 classes	(9,192 participants)	*141 institutions	297 classes	(9,204 participants)
	*109 elementary schools, 4 junior high schools, 11 high schools, 14 others			*104 elementary schools, 11 junior high schools, 11 high schools, 15 others		
Saturday Classes	54 institutions	118 classes	(3,545 participants)	55 institutions	120 classes	(3,581 participants)
Saturday Education Activities	3 institutions	2 classes	(46 participants)	6 institutions	6 classes	(157 participants)
Weekday Classes	67 institutions	155 classes	(5,099 participants)	67 institutions	153 classes	(4,915 participants)
Other	14 institutions	18 classes	(502 participants)	13 institutions	18 classes	(551 participants)

<Activity Formats>

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 pupils/students in the area.

Weekday Classes: Above activities held on weekdays.

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

3. Dispatching Lecturers for Schools

(2) Dispatching Lecturers for University Students

(Financial Literacy Visiting Lectures, etc.)

(2) Dispatching Lecturers for University Students (Financial Literacy Visiting Lectures, etc.)

- Lecturers are dispatched to universities across Japan for the purpose of promoting awareness and understanding of the importance of asset building through securities investment by university students, who are at the stage of establishing their abilities to become independent professionals, through explanations of the importance of money plans based on life & estate planning and of the significance of securities investment and market.
- Single lecture (90 minute) as part of undergraduate class by the educator and at career centers, etc. by encouraging university educators and administrators
- The lecturers are registered finance/securities instructors and officers and employees of the JSDA
- Lecturers were dispatched to 127 universities for 236 lectures with 15,472 participants in FY18

	FY18	FY17
	127 universities, 236 lectures (15,472 participants)	121 universities, 220 lectures (13,785 participants)
Financial Literacy	111 universities, 197 lectures	93 universities, 156 lectures
Securities Market/Securities Industry	30 universities, 39 lectures	49 universities, 64 lectures

*The total number of universities varies as some lectures covered both topics



◆ Financial Literacy Visiting Lecture Pamphlet



◆ Lectures

4. Support/Collaboration

(2) Support for the activities of the “Study Group on the Promotion of Financial and Economic Education”



Support for the activities of the “Study Group on the Promotion of Financial and Economic Education”

JSDA acts as the secretariat for 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)

[Activities for FY18]

- Provided “Reference material for preparing the text book based on the next School Curriculum Guideline” for high school textbook publishers, etc.
- Made presentations at academic conferences related to social studies and consumer education
- Provided e-learning lecture materials for teaching license renewal “Financial Literacy 101 for Kids: Useful Pointers on How to Handle Money” conducted by the Talent Development Education Research Foundation. (participated by 756 teachers in FY18)

(As of end of FY18)

Chair: Naoyuki Yoshino (Dean, Asian Development Bank Institute and Professor Emeritus, Keio University)

Members:

Hiroshi Ishige (Professor, Department of Economics, Teikyo University)
Tokuo Iwaisako (Professor, Institute of Economic Research, Hitotsubashi University)
Hidetaka Kawakita (Professor, Graduate School of Management, Kyoto University)
Hisashi Kurihara (Professor, Faculty of Literature, Department of Education, Toyo University)
Kenichi Tashiro (Senior Teacher, Shibuya Honmachi Gakuen)
Kimitaka Nishimura (Vice President, Naruto University of Education)
Eriko Hanawa (Teacher, Fuchu Higashi High School)
Hironori Yamaguchi (Professor, School of Economics, Hokusei Gakuen University)

Sadahira Ishimoto (Senior Teacher, Oizumi Junior High School)
Yuji Kage (Senior Adviser, Blackstone Group Japan K.K.)
Yuji Kitano (Associate Professor, Faculty of Economics, Momoyama Gakuin University)
Katsuya Takahashi (Associate Professor, Faculty of Law, Nagoya Keizai University)
Akito Tsukamoto (former Director, BS Asahi)
Takao Nishimura (Professor Emeritus, Yokohama National University)
Keiko Murakami (Professor, Faculty of Management and Information Systems, Prefectural University of Hiroshima)
Nobuyoshi Yamori (Professor, Research Institute for Economics and Business Administration, Kobe University)

Support for All-Japan Securities Study Student League Activities

- Continued support for the activities of the All-Japan Securities Study Student League (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 annually in December with universities across Japan (discussion on 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)
- FY18 Securities Seminar Convention was held on December 21-22 at the National Olympic Memorial Youth Center in Tokyo, with the participation of 646 students from 32 universities across Japan (50 organizations, 132 teams), and discussions held among 18 blocks (552 students from 31 universities across Japan participated in FY17)

[FY18 Discussion Themes]

- (1) Activation of future domestic securities market
- (2) Investment trust as household asset building method
- (3) Approach towards financial literacy in Japan
- (4) Bank of Japan monetary policy and securities market
- (5) Institutional investor behavior and securities market
- (6) Fundraising for SMEs/ventures in Japan



◆ Securities Seminar Debates



◆ Securities Seminar Awards Ceremony

5. Participation in International Investor Education Activities

Participation in International Forum for Investor Education (IFIE)

- As the Global Chair of the International Forum for Investor Education (IFIE) and Chair of the Asia Chapter, JSDA participated in conferences, etc. held by the Forum and actively exchanged information with the representatives
- JSDA hosted the 2018 IFIE-IOSCO Investor Education Conference in Tokyo and discussed under the theme of “Building Lifelong Financial Resiliency in a Changing Environment” over three days in April 2018. Approximately 100 overseas participants from 60 institutions in 34 jurisdictions, and about 60 participants from Japan. Also served as the Chair for Asia Chapter Annual General Meeting adjacent to the Conference.
- Expert speakers on investor education and protection from Japan and overseas included Chairman Yoshikuni of the Central Council for Financial Services Information, Japan; State Minister Ochi from Financial Services Agency; Secretary General of IOSCO; Director of Office of Investor Education and Advocacy of SEC. Shigeharu Suzuki, Chairman and CEO of JSDA made Welcome Remarks, and Kumi Fujisawa, Chair of Financial Literacy and Education Support Committee made an introductory presentation on JSDA activities for the younger generation
- In November 2018, JSDA served as the Chair for the interim meeting of the Asia Chapter held in Bali, Indonesia



◆ IFIE Conference



◆ Speakers



日本証券業協会
Japan Securities Dealers Association

Summary of Financial Literacy and Education Support Activities for FY2018 (Activities for Working Adults and Senior Citizens)



Summary of Financial Literacy and Education Support Activities (Activities for Working Adults and Senior Citizens)

Young Working Adults

General Working Adults

Senior Citizens

Providing Website Content

"Learning" category: "Time for Investment" website (released on August 30)

FY18: 867,326 page view (406,098 unique users)

Producing and Publishing Materials

Beginner's Guide to Asset Management and Securities Investment

FY18: 40,000 copies, e-book: 5,873 downloads
FY17: 53,000 copies, e-book: 2,388 downloads

Introduction to Defined Contribution Pension Plans

FY18: 15,000 copies,
e-book: 4,361 downloads (released in June)
FY17: 15,000 copies

Securities Tax System Q&A for Retail Investors

FY18: 83,000 copies, e-book: 2,612 downloads (released in June)
FY17: 111,000 copies

E-book App

FY18: 2,906 downloads
FY17: 6,347 downloads

Conducting Seminars

First Time Securities Investment Seminar

FY18: 2,724 participants (10 venues)

First Time Asset Management Lecture

On "Stocks/Bonds" and "Investment Trusts/NISA/iDeCo"

FY18: 5,661 participants (60 venues, 120 lectures)
FY17: 5,659 participants (54 venues, 108 lectures)

Dollar-Cost Averaging NISA/iDeCo

FY18: 525 participants (6 venues, 6 lectures)
FY17: 602 participants (6 venues, 6 lectures)

For Young Investors FY18: 155 participants (3 venues, 3 lectures)
FY17: 242 participants (3 venues, 3 lectures)

For Senior Investors FY18: 156 participants (3 venues, 3 lectures)
FY17: 176 participants (3 venues, 3 lectures)

Dispatching Lecturers

Dispatch Lecturers for Working Adults and Senior Citizens

FY18: 198 institutions, 373 lectures (12,813 participants)
FY17: 152 institutions, 357 lectures (12,948 participants)

1. Publishing Website Content

(1) "Time for Investment" website

- **Time for Investment** was launched at the end of August 2018 as a site for learning asset management and securities investment
(Prepared in consideration of simple presentation, convenience, easy navigation, and mobile accessibility)



◆ **Time for Investment website** <http://www.jsda.or.jp/jikan/>

投資の時間

検索



1. Publishing Website Content

(2) "Time for Investment" website: main content

- Content aimed to help individuals without knowledge on asset management and securities investment, as well as those who do not know where to start, to learn the basics using explanations and illustrations in an easy-to-understand and structured manner

Lesson 1 Necessity for Money Planning

Need for money and life planning

Lesson 2 What is Asset Management?

Difference between saving and investment, social significance of investment

Lesson 3 Risk and Return

Relationship between risk and return, types of risks

Lesson 4 Types of Financial Products

Features and structures of financial products (stocks, bonds, investment trusts)

Lesson 5 How to Start Investing

Approach towards long-term/diversified/installment-type investments and portfolios



1. Publishing Website Content

(3) "Time for Investment" website: special content

- Content includes materials aimed to bolster learning about the need and significance of securities investment by answering questions from beginners and inexperienced investors; choosing suitable financial products by answering several questions on personal behavior and thought patterns; and real-life experiences of securities investors

◆ Do I Need Investment? ◆ Financial Product Matching Chart



◆ First Time Securities Investment Seminar Report Sample article (posted on January 2019)



2. Producing and Publishing Materials

(1) Beginner's Guide to Asset Management and Securities Investment

- Prepared a beginner's guide that provides basic knowledge about securities investment ("Significance of Securities Investment," "Features of Securities (Stocks, Bonds, Investment Trusts)," "Knowledge of Risks (meaning of risks, risk mitigation)," and explanations on "Asset Building Support Systems such as the Dollar-Cost Averaging NISA" (A4, 90 pages)
- Distributed at seminars and visiting lectures, etc.

(40,000 copies prepared in FY18)



◆ Cover



◆ Outline



◆ Application

2. Producing and Publishing Materials

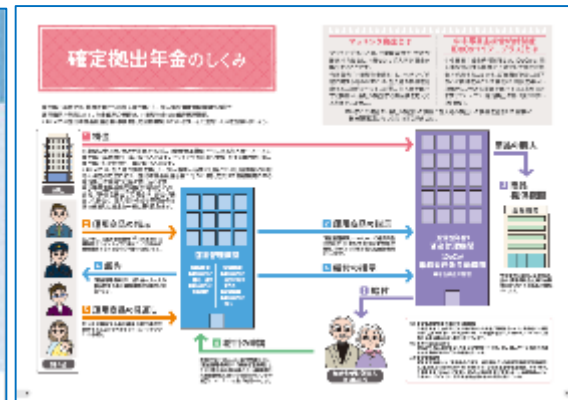
(2) Introduction to Defined Contribution Pension Plans/Securities Tax System Q&A for Individual Investors

○ Introduction to Defined Contribution Pension Plans

- A beginner's guide providing simple explanations on the mechanism, features, and points of note
- Distributed at seminars and visiting lectures, etc.
(15,000 copies prepared in FY18)



◆ Cover



◆ Main Text

○ Securities Tax System Q&A for Retail Investors

- A booklet providing concise explanations on the securities taxation system for retail investors, with illustrations and diagrams, presented in a Q&A format
- Distributed at seminars
(83,000 copies prepared in FY18)



◆ Cover



◆ Main Text

2. Producing and Publishing Materials

(3) Free downloads offered at e-bookstores

- “Beginner’s Guide to Asset Management and Securities Investment,” “Introduction to Defined Contribution Pension Plans,” and “Securities Tax System Q&A for Retail Investors” offered free of charge for downloading from e-bookstores (17 stores)
(FY18: total of 12,846 downloads for the three publications)
- * “Introduction to Defined Contribution Pension Plans” and “Securities Tax System Q&A for Retail Investors” were released in June 2018



◆ Sample screen of e-bookstore (Amazon Kindle)

Amazon Kindle	Rakuten Kobo	ibooks
GooglePlay Books	ebookjapan	Sony Reader Store
dbook	Hikari TV Book	music.jp
COCORO BOOKS	Seven Net Shopping	DMM Electronic Books
Neowing	honto	BookLive!
Books Kinokuniya Web Store	Bookpass	

◆ List of e-bookstores

- Publications provided through e-book apps
(FY18: 2,906 downloads)



3. Seminars for Working Adults and Senior Citizens (1) First Time Securities Investment Seminar

- Held seminars targeting beginners who are interested in securities investment (specifically, interest but not actively gathering information, or who are currently without access to securities companies/financial institutions), to provide basic knowledge on finance/securities (features of financial products, risk and return, importance of long-term/installment-type/diversified investment) and the significance and advantage of stock investment from the perspective of shareholder incentives
- 2,724 participants in 10 venues across Japan in FY18
- Articles posted on the Time for Investment website after the seminars

Program

[Part I, 40 minutes]

"Importance of Asset Building with Long-term, Diversified, Installment-type Investment"

Lecturer: registered finance/securities instructors

[Part II, 50 minutes]

"Significance and Appeal of Stock Investment from the Perspective of Shareholder Incentives"

Hiroto Kiritani (professional Shogi player, retail investor)

"Significance and Appeal of Stock Investment from the Perspective of Finding Japanese Growth Companies"

Hidetoto Fujino (CEO, Rheos Capital Works, Inc.)



Seminar



テキスト

「ゼロからはじめる証券投資セミナー」レポート

Article posted on Time for Investment

◆ Number of Participants

Region	Number of Seminars	Venue	Applicants	Participants
Tokyo	1 venue, 1 seminar	Chiyoda-ku	200	136
Osaka	1 venue, 1 seminar	Osaka City	459	296
Nagoya	1 venue, 1 seminar	Nagoya City	894	622
Hokkaido	1 venue, 1 seminar	Sapporo City	198	143
Tohoku	1 venue, 1 seminar	Sendai City	273	209
Chugoku	2 venues, 2 seminars	Hiroshima City/Okayama City	827	541
Shikoku	2 venues, 2 seminars	Takamatsu City/Tokushima City	706	563
Kyushu	1 venue, 1 seminar	Fukuoka City	1,357	214
Total	10 venues, 10 seminars		4,914	2,724

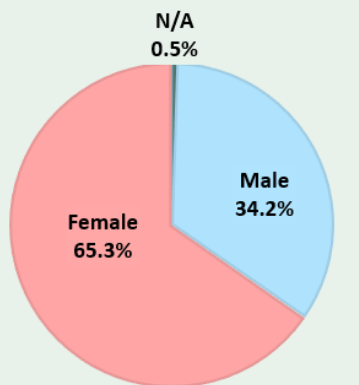
3. Seminars for Working Adults and Senior Citizens

(1) First Time Securities Investment Seminar

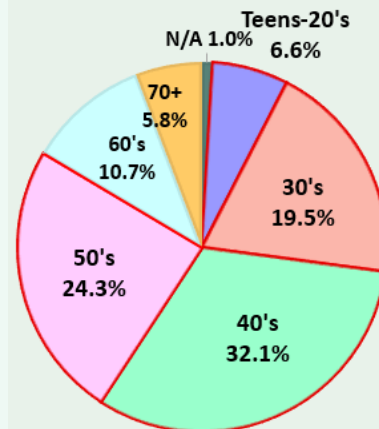
[Reference] Participant Profile

Participant Profile

Gender

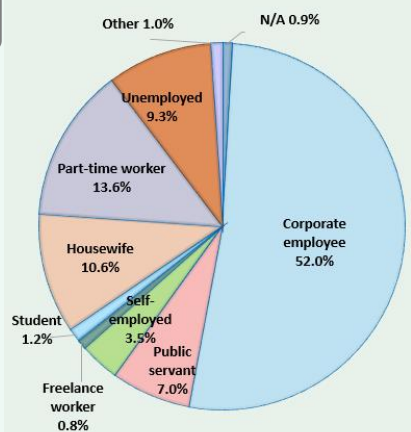


Age

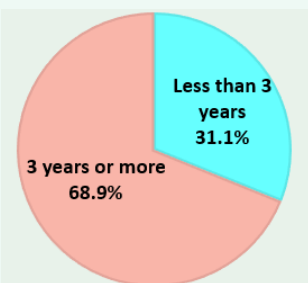
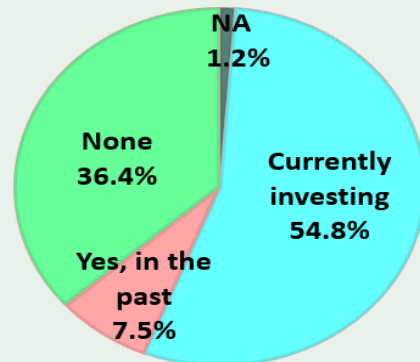


(50s or younger)
FY18: 82.5%

Occupation



Investment Experience



3. Seminars for Working Adults and Senior Citizens (2) First Time Asset Management Lecture

- Lectures for beginners and inexperienced investors were held in all prefectures in collaboration with the FSA and relevant organizations on the basics of finance and securities (features of financial products, necessity of life planning and money planning, risks and returns, diversified investment, and long-term investment) and to deepen understanding of the Dollar-Cost Averaging NISA and iDeCo, etc.
- 6,497 participants in 72 venues across all prefectures in FY18
(6,679 participants in 66 venues across all prefectures FY17)

Program

[Stocks/Bonds, 2 x 60 minutes]

Basic knowledge re: asset management, basic knowledge re: stock and bond investment

[Investment Trust/NISA/iDeCo, 2 x 60 minutes]

Structure and choice of investment trusts, utilization of asset building support systems (NISA/defined contribution pension plans)

[Special Edition (NISA/iDeCo) 2 x 60 minutes]

Survivor's Guide: the Basics of Dollar-Cost Averaging NISA and iDeCo

How to choose your first investment trust, etc.



Lecture



Lecture Materials

◆ Number of Participants

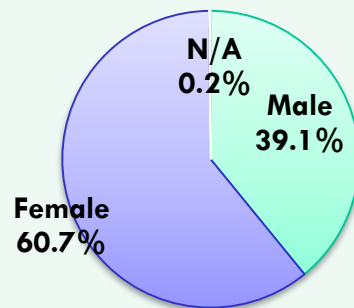
Region	Number of Seminars	Applicants	Participants
Tokyo	19 venues, 34 lectures	2,941	1,970
Osaka	13 venues, 22 lectures	1,733	1,214
Nagoya	10 venues, 16 lectures	1,109	806
Hokkaido	2 venues, 4 lectures	294	204
Tohoku	7 venues, 14 lectures	755	651
Hokuriku	3 venues, 6 lectures	362	292
Chugoku	6 venues, 12 lectures	716	590
Shikoku	4 venues, 8 lectures	283	217
Kyushu	8 venues, 16 lectures	686	553
Total	72 venues, 132 lectures	8,879	6,497

3. Seminars for Working Adults and Senior Citizens

(2) First Time Asset Management Lecture

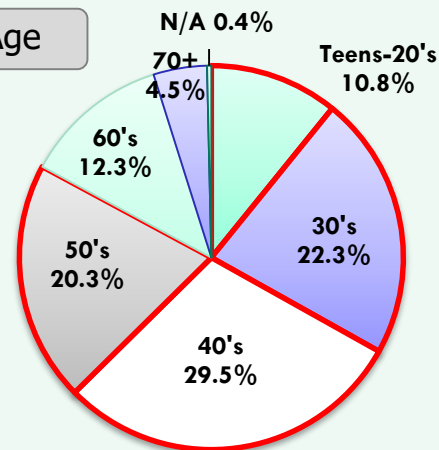
Participant Profile

Gender



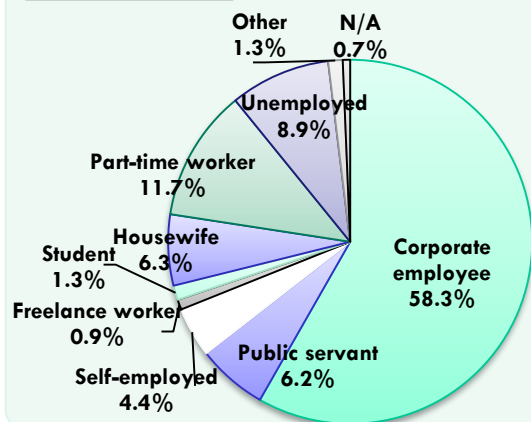
(FY17)
Male: 44.1%
Female: 55.4%

Age

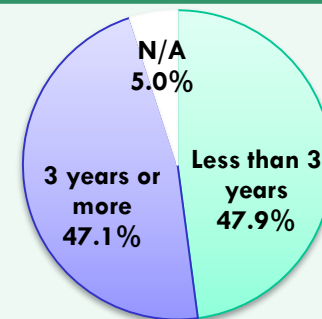
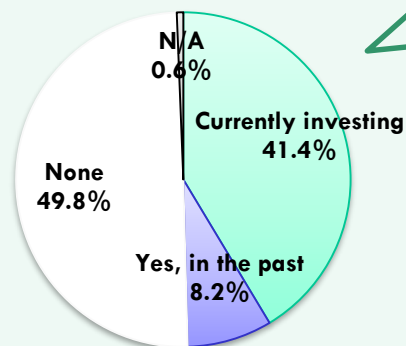


(50s or younger)
FY18: 82.9%
FY17: 80.0%

Occupation



Investment Experience



(FY17)
Inexperienced: 50.6%

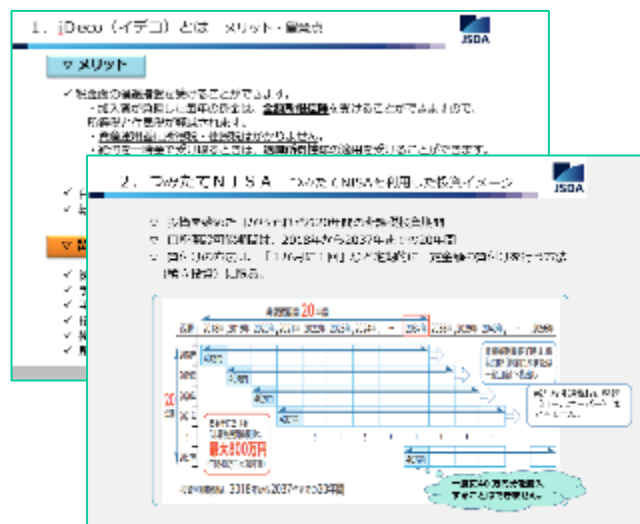
4. Dispatching Lecturers for Working Adults and Senior Citizens

- JSDA, from our neutral and fair position, dispatches registered finance/securities instructors free of charge to aid in employee training for municipal organizations across Japan, for private corporations, and for local resident seminars held at civic halls, etc., and provide lectures mainly on life planning, asset management, basic knowledge about financial products, NISA, and iDeCo, etc.
- FY18: Dispatched to 198 institutions for 373 classes, 12,813 participants
(FY17: 152 institutions for 357 classes, 12,948 participants)

<Summary>

- Lecturer: Instructors registered as finance/securities instructors with the JSDA, who are mainly from financial institutions/securities companies
- Participants: 10 or more in attendance, in principle
- Time: 1-2 hours per lecture

• Sample handout



<Major Topics>

Life Planning
for Future

Need for life planning, etc.

Planning for
Life after
Retirement

Need for money planning, etc.

Basic Knowledge
of Financial
Products

Features of Financial Products, etc.

Summary of
NISA

What is NISA? etc.

Summary of
iDeCo

What is iDeCo? etc.



URL: <http://www.jsda.or.jp/jikan/>

投資の時間 協会

検索