



日本証券業協会
Japan Securities Dealers Association

Financial Literacy and Education Support Activities Report

(Results, etc., for the Fiscal Year Ended March 2016)

Japan Securities Dealers Association
Financial Literacy & Education Support HQ

Our Commitment to Promotion and Enlightenment in Financial Literacy



Japan Securities Dealers Association's Financial Literacy Promotion and Enlightenment Activities

The Japan Securities Dealers Association (“JSDA”^{*1}) is engaged in activities to promote financial and securities knowledge and enlightenment in schools and to the general public from a neutral and fair perspective, to improve the so-called “financial literacy,” or the ability of wide range of citizens to correctly understand information concerning financial products, etc., and make proactive decisions for themselves.

In addition, the JSDA is conducting activities in collaboration with organizations participating in the Securities Knowledge Proliferation Project^{*2}, and actively engaged in participation and planning of international conferences, and cooperation with international agencies.

(*1) The legal status of the JSDA is a Financial Instruments Firms Association authorized under the Financial Instruments and Exchange Act (FIEA). In accordance with the FIEA, the JSDA is endeavoring to facilitate the sound development of the Japanese financial instruments business and the protection of investors through the dissemination of financial knowledge and through education and publicity campaigns (FIEA, Article 77-4).

(*2) The Securities Knowledge Proliferation Project aims to promote and enlighten the public about securities knowledge on a continuous and long-term basis from a fair and neutral perspective. The members of the Project conduct a wide-range of related activities, such as providing teaching materials useful in teaching financial and economic education in various courses to schools and holding seminars and lectures for general consumers. Nine member organizations are: the JSDA; Japan Exchange Group; Tokyo Stock Exchange; Osaka Securities Exchange; Nagoya Stock Exchange; Fukuoka Stock Exchange; Sapporo Stock Exchange; Investment Trusts Association, Japan; and the Association of Nagoya Stock Exchange Trading Participants. (as of end of March, 2016)

	Elementary Schools	Junior High Schools	High Schools	Universities
Dispatch Instructors	Saturday Educational Activities FY15: 81 schools (160 classes, 4,797 participants) FY14: 18 schools (36 classes, 1,021 participants)			Financial Literacy Home Delivery Course FY15: 69 schools (101 classes) FY14: 31 schools (40 classes)
Develop and Provide Teaching Materials	Let's Form a Stock Company! A Challenge from Mr. X FY 15: 317 schools, 29,865 students FY 14: 292 schools, 28,231 students			Three Doors to Understanding the Economy: Let's Take a Voyage of Economic Discovery FY 15: 326 schools, 29,982 students FY 14: 286 schools, 24,844 students
	Stock Learning Game FY 15: 875 schools, 39,936 participants* FY14: 830 schools, 35,480 participants*			Stock Company System and Securities Market Framework FY15: 11,371 copies, FY14: 10,587 copies
Seminars and Lectures	Summer Seminar for Teachers (9 locations) FY 15: 536 participants* FY14: 577 participants*			Securities/Finance Seminar (Tokyo) FY 15: 168 participants* FY14: 173 participants*
	Educational Administrator Seminar (Tokyo) FY 15: 68 participants* FY14: 84 participants*			Personal Finance Seminar (Tokyo/Osaka/Nagoya) FY 15: 238 participants* FY14: 232 participants*
	Experience Finance and Security Program (Tokyo/Osaka/Nagoya) FY 15: 125 participants* FY14: 143 participants*			
Information Magazine and Website	"Rainbow News" information magazine for teachers 22,000 copies per issue (issued three times per year)			
	Website "Kinyukeizai Navi" FY15: 70,063 accesses, FY14: 64,032 accesses			
Support for Study Groups, etc.	Support for "Study Group on the Promotion of Financial and Economic Education" (Chaired by Naoyuki Yoshino)			Support for All-Japan Securities Study Student League
International symposiums	Participation in International Investor Education Activities			

Young Professionals

General Professionals

Senior Citizens

Providing Web Contents, etc.

Shiro Tsubuyaki's Snakes and Ladders of Life

FY15: 10,312 (ended on January 29th)
FY14: 18,978Shellfish Workers' "INVEST TO THE FUTURE"
app promotion videos

FY15 (from March 11): 30,015

"Hamakan" Investment Management Theater

FY15: 33,849
FY14: 34,862Learn with Video!
Easy to Learn Securities Investment Basic KnowledgeFY15: 34,613
FY14: 40,241Finally starting! Junior NISA
NISA system brings value to everybody

FY15 (from March 11): 4,318

Electronic Book App

FY15: 12,813 total downloads
FY14: 6,840 total downloads

Publication of "Want to know more: Q&A"; "Glossary of Financial and Securities Terms"; and materials (see below)

*Figures indicate the aggregated total number of web page and YouTube views.

Producing and Publishing Materials

"First Time! Asset management"

FY15: 15,000 copies, FY14: 13,000 copies

"Introduction to Defined Contribution

FY14: 5,500 copies

"Introduction to Investment (Basic Guide for Securities Investment)"

FY15: 20,000 copies, FY14: 16,000 copies

"Securities Tax System Q&A for Individual Investors"

FY15: 124,000 copies, FY14: 121,000 copies

"Guide to Securities Tax System"

FY15: 11,000 copies, FY14: 11,000 copies

Sponsoring Seminars and Events

Financial Literacy Study Courses

FY15: 613 participants (15 venues) *12,238 on-demand video deliveries
FY14: 1,001 participants (20 venues) *9,564 on-demand video deliveries

Promoting Activities for "Investment Day"

FY 15: 4,117 participants (21 venues)
FY 14: 5,770 participants (19 venues)

Seminars for Younger Generation (Women)

FY 15: 252 participants (2 venues) + Contents offered on web Mynavi Woman
FY 14: 733 participants (3 venues) ... video-on-demand

Financial Knowledge Seminars for Senior Citizens

FY 15: 132 participants (1 venue) + Transcripts posted on web
FY 14: 338 participants (2 venues)

Activities for Schools

(1) “Saturday Educational Activities”

- As part of efforts to further financial and economic education, JSDA conducts classes using “Challenge! Snack Co., Ltd.,” a study program that teaches students (mainly elementary/junior high schools) about the mechanism of a stock company through developing products for a confectionery company and financing its operations.
- The lecturers are employees of the JSDA and its member firms.
- In FY15, lecturers were dispatched to 160 classes in a total of 81 elementary/junior high/high schools, with 4,797 participants.

	FY15			FY14		
	81 schools	160 Classes	(4,797 participants)	18 schools	36 Classes	(1,021 participants)
Saturday Classes	48 schools	103 Classes	(3,160 participants)	7 schools	13 Classes	(357 participants)
Saturday Learning	12 schools	14 Classes	(290 participants)	3 schools	3 Classes	(83 participants)
Dispatch Lectures	21 schools	43 Classes	(1,347 participants)	8 schools	20 Classes	(581 participants)

<Activity Format>

Saturday Classes: Classes are held for all pupils/students, mainly sponsored by the schools as part of the regular curriculum.
Saturday Learning: 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.).
Dispatch Lectures: Above activities held on weekdays.



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



◆ Classroom study (top)



◆ Students' work

[Schools] Lecturers Dispatched for Education: (Financial Literacy “Home Delivery” Lectures for University Students)

(2) 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 FY15, lecturers were dispatched for a total of 101 classes in 69 universities, with 6,247 participants.

	FY15	FY14
	101 Lectures at 69 universities (6,247)	40 Lectures at 31 universities (2,411)
Financial Literacy	64 Lectures at 49 universities	21 Lectures at 15 universities
Securities Companies/Securities Market	37 Lectures at 31 universities	19 Lectures at 19 universities

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



◆ “Financial Literacy ‘Home Delivery’ Lecture” leaflet



◆ Lectures

【Schools】 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 FY15, a total of 317 schools and 29,865 students used the materials.
(FY14: 292 schools and 28,231 students)
- The program was conducted as part of the Securities Knowledge Proliferation Project.



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



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

(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 economic fluctuation,” 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 FY15, a total of 326 schools and 29,982 students used the materials.
(FY14: 286 schools and 24,844 students)
- The program was 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 tutorial for teachers
<http://www.kinyu-navi.jp/textbook/contents9/index.html>

(2) Stock Market 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 through stock trading simulation.
- In FY15, a total of 875 schools and 39,936 students participated. (FY14: 830 schools and 35,480 students)
- 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
取引結果一覧
2013年10月30日
Aコース 2013年10月28日現在
JTY高校
保有株式の状況を確認する
チーム名
チームA協
Aコース/チームA協/0017
2013年10月20日現在
取引履歴
取引コード 銘柄名 売買 約定日 取引量 単価 金額 買値金額 エラー
4061 OLC 買 10月28日 100 15,280 1,528,000 1,528,000
8136 サンリオ 買 10月28日 200 5,540 1,108,000 1,108,000
手続現金残高 7,366,000

保有株式の状況
取引コード 銘柄名 保有数 現在値 評価額
4061 OLC 100 15,580 1,558,000
8136 サンリオ 200 5,430 1,086,000
時価評価額合計 2,644,000
資産合計 10,008,000

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

(3) Finance and Securities Study Aid:

“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 school students, and is to be used as a teaching aid for learning about the economy and stocks.
- In response to requests from schools, 11,371 booklets were provided in FY15. (FY14: 10,587 booklets)



◆ Finance and securities study materials

(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 FY15, nine events were held at nine venues in major cities between late July and mid-August, with 536 participants. (FY14: nine events at nine venues between late July and mid-August, with 577 participants.)
- Transcripts of some of the lectures from the seminars are published on the JSDA website.

Location	Date	Number of Participants
Sapporo City	August 5 (Wed) to 6 (Thurs)	52
Sendai City	July 27 (Mon)	31
Tokyo	August 4 (Wed) to 6 (Thurs)	139
Nagoya City	August 18 (Tues) to 19 (Wed)	88
Kanazawa City	August 19 (Tues)	24
Osaka City	August 4 (Tues) to 5 (Wed)	124
Hiroshima City	August 10 (Mon) to 11 (Tues)	37
Takamatsu City	August 10 (Mon)	17
Fukuoka City	August 6 (Thurs)	24



◆ Lecture



◆ Field trip to a company

(ii) Educational Administrators Seminar

- “Educational Administrators Seminars” are held for principals, vice principals and assistant principals of elementary, junior high and high schools and for other educators, for the purpose of enhancing their understanding on the need for and promoting the introduction of, education on finance and economy at schools.
- In FY15, the seminar was held on August 8th (Saturday) in Tokyo, with 68 participants.
(FY14: October 18th (Saturday) in Tokyo, with 84 participants.)

◆ Themes and Lecturers for Educational Administrators Seminar

Theme	Lecturer
Expectations and Issues concerning Education on Finance and Economy at Schools	Professor Nobuyoshi Yamori, Kobe University Research Institute for Economics & Business Administration
Overview of JSDA’s Financial and Economic Education Programs	JSDA employee
Building a Better Relationship between Teachers and Parents	Shinichi Sekine, Complaints and Claims Management Advisor



◆ Lecture

(iii) 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 FY15, the program was held on August 18th (Tuesday) and 19th (Wednesday) in Tokyo, December 25th (Friday) in Nagoya, and March 28th (Monday) in Osaka.
- Number of participants were 37, 40, and 48 in Tokyo, Nagoya, and Osaka, respectively, or a total of 125.
(FY14: 48, 46, and 49 in Tokyo, Nagoya, and Osaka, respectively.)

◆ Date of Events

Location	Date	Number of Participants
Tokyo	August 18 (Tues) to 19 (Wed)	37
Nagoya	December 25 (Fri)	40
Osaka	March 28 (Mon)	48



◆ Study of teaching materials



◆ Observation tour of Tokyo Stock Exchange

(2) Seminars for University Students

(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 FY15, seminars were held on December 6th, 19th, and 20th in Tokyo, Osaka, and Nagoya, respectively, with a total of 238 participants. (FY14: February 10th, 19th, and 20th in Tokyo, Osaka, and Nagoya, respectively, with a total of 232 participants.)

◆ Themes and Lecturers

	Theme	Lecturer
Part I	Basics of Life Planning and Asset Management	Yumiko Okada, Financial Planner
Part II	Let's Prepare a Life Event Table	JSDA employee
Part III	Basics of Securities Market	JSDA employee



◆ Lecture

(ii) Securities and Finance Seminar for University Students

- JSDA hosts “Securities and Finance Seminar for University Students” for studying a wide range of topics including the basics of securities investment and defined contribution pension plans, significance of investment, and the role of the securities market, to let them acquire the ability to manage and invest in financial assets.
- In FY15, it was held on September 8th in Tokyo with 168 participants. (FY14: September 11th in Tokyo with 173 participants.)

◆ Themes and Lecturers

	Theme	Lecturer
Part I	What are Securities Companies/Securities Market?	Daiwa Institute of Research, Financial & Capital Market Research Dept. <i>Senior Researcher, Tamami Ota</i>
Part II (Elective)	Basic Knowledge on Money: Things You Should Know Before Joining the Workforce	JSDA employee
	Let's Create a Portfolio Together!	JSDA employee



◆ Lecture

(1) “Rainbow News” information magazine for teachers

- The information magazine is provided 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.28)

(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 institutions), 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 FY15, there were 70,063 accesses. (FY14: 64,032)
- The program is conducted as part of the Securities Knowledge Proliferation Project.



◆ “Kinyukeizai Navi”

(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.)
- * In September 2015, the Study Group submitted the “Petition for Further Enhancement on Financial and Economic Education at Junior High and High Schools” to the Minister of Education, Culture, Sports, Science and Technology in relation to the revision of the School Curriculum Guideline.
- “Subcommittee for Improving University Students’ Financial Literacy” (Chair: Professor Nobuyoshi Yamori, Kobe University Research Institute for Economics & Business Administration) was established to discuss specific methods, etc. for improving university students’ financial literacy.

◆ Petition

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



◆ Study Group meeting



(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 FY15, the “Securities Seminar Convention” was held on December 11th (Friday) and 12th (Saturday) at the National Olympics Memorial Youth Center in Tokyo, with 583 students from 33 universities participating. (FY14: 33 universities and 691 students)



◆ Securities Seminar Convention

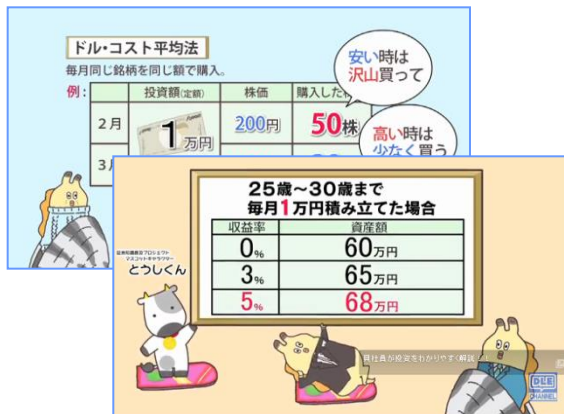
Activities for the General Public

(1) Production of New Video Contents for Younger Generations

- Shellfish Workers' "INVEST TO THE FUTURE" videos were produced for the purpose of raising awareness and interest in securities investment among the younger generations and promoting understanding on the significance of life and money planning and asset management. The video was launched on March 11, 2016.
- PR activities using SNS have been launched in March 2016. 【New Projects for FY16】



◆ Special site



◆ Video Clips



◆ Shellfish Worker Twitter



- ◆ Four new video clips
- 1. From 202X (Asari is 30 years old) → Feature event: Marriage
- 2. From 204X (Asari is 50 years old) → Feature event: Child birth and parenthood
- 3. From 205X (Asari is 60 years old) → Feature event: Purchasing a house
- 4. From 207X (Asari is 80 years old) → Feature event: Senior life



◆ “Mynavi Woman” website with hyperlink

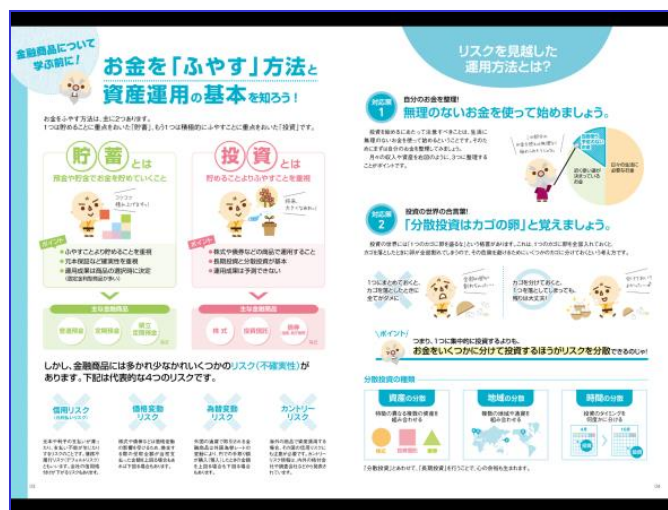
◆ JSDA Twitter

(2) Providing Information with Electronic Books and Websites

- Providing various publications in e-book application format and delivering various information using the internet including video recordings of seminars and distribution of mail magazines.
- In addition to the establishment of special site for the “Investment Day” annual events, video contents including “Shellfish Workers’ ‘INVEST TO THE FUTURE’,” “Hamakan” Investment Management Theater,” and “Securities Investment Basic Knowledge (for beginners and inexperienced investors)” are being offered.








◆ App screen (iPad)



◆ App promotion (made in collaboration with “Shellfish Workers” production service)

【General Public】 Producing and Publishing Materials for Beginners and Inexperienced Investors

As of end of March 2016

Types of Publications (Edition/Format)		Number of Copies	
		FY 14	FY 15
 <p>(1) “First Time! Asset management” A beginners’ guide mainly targeting new graduates and younger generation in their 20s and 30s, providing simple explanation on the significance of life and money planning, and basic knowledge on financial products. (Fourth edition/ A4, 34 pages)</p>		13,000	15,000
 <p>(2) “Introduction to Investment (Basic Guide for Securities Investment)” A beginner’s guide providing explanation on preparing for securities investment; features of various products including stocks, investment trusts, bonds; basic knowledge on specific information gathering and what they mean; explanation on the NISA system (tax-exemption for small investment accounts) launched in January 2014. (Third edition/ A4, 58 pages)</p>		16,000	20,000
 <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. (FY15 version/ A4, 24 pages)</p>		121,000	124,000
 <p>(4) “Guide to Securities Tax System” A booklet providing detailed explanation on securities taxation system for individual investors, using charts and Q&A. (FY15 version/ B5, 160 pages)</p>		11,000	11,000
 <p>(5) “Introduction to Defined Contribution Pension Plans” A beginner’s guide providing simple explanation on the mechanism, features and points of notice concerning the defined contribution pension system. (Third edition/ A4, 20 pages)</p>		5,500	No publication in FY15.

(1) Financial Literacy Study Courses

- “Financial Literacy Study Course (NISA Preparation Special Course)” was held for the purpose of improving financial literacy of beginners and inexperienced investors who have limited investment knowledge and experience, that are opening new accounts. Topics included the significance of life and money planning, explanation of the NISA system, understanding of risks involved with investment, and explanation on asset creation products.
In addition, video clips of the lectures were published on the website for people who could not attend.
- In FY15, the courses were held at 15 venues with 613 participants.
(FY14: 20 venues with 1,001 participants)



◆ Lecture

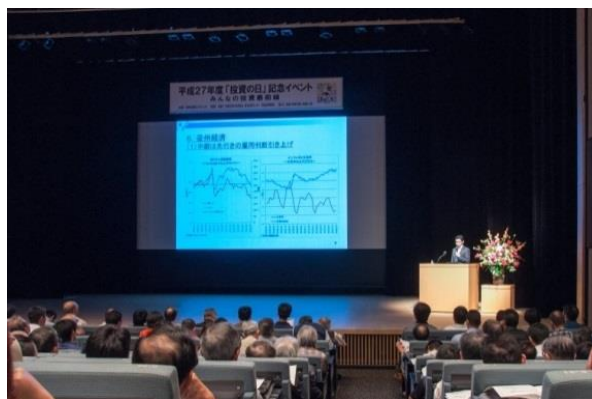


◆ Video clip

(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. (Securities Knowledge Proliferation Project)
- In FY15, events were held at 21 venues in 9 districts with 4,117 participants.
(FY14: 19 venues in 9 districts with 5,770 participants)

◆ October 4, 2015 (Sunday) Nikkei Hall



Lecture:

“Where is the Japanese Economy Headed?”

Lecturer:

Toshihiro Nagahama

(Chief Economist, Economic Research Department,
Daiichi Life Research Institute, Inc.)



Panel Discussion:

“Investment front line! Questions for a charismatic individual investor! What is the real appeal of investment?”

Panelists:

Akira Katayama (Investor, Representative Director and President, Sirius Partners Co., Ltd.)

Taizo Sugimura (Former member of the House of Representatives, entertainer)

Shinobu Naito (Representative Director and President, Asset Design Laboratory Co., Ltd.)

Moderator: Mari Watanabe (Announcer)

(2) Setting Up NISA Corners

- The Project set up “NISA Counseling Corner” in the lobby of each “Investment Day” event venue (18 locations), manned by securities counselors provided by NPO APROSIS. The counselors answered a total of 204 questions and enquiries about NISA and junior NISA system from a neutral and fair perspective.



◆ NISA corner

(3) Publication of Feature Articles (Summary of the event held in Tokyo disseminated through national newspapers, etc.)



◆ Newspapers
(half page advertisement)
Publication Media:
The Nikkei
Asahi Shimbun
Yomiuri Shinbun



◆ Special site

▼ 10月4日は投資の日！ ▼

みんなの投資最前線

証券知識普及プロジェクト

イベント開催はこちら

4つの投資Story

きっかけ編 ▶
学ぶ編 ▶
結果編 ▶

「投資の日」記念イベント

全国で開催。「投資」をもっと身近に！

参加無料

NEWS

- ・2015.12.1 みんなでチャレンジ！「投資の日」ウイズを首都圏各地で開催。次々会場から観客が押し寄せました。

10月4日（日）日本ホール
 東京グランドホテル近辺にて開催しました。

司会：中野 孝典

パネリスト：佐藤 大輔、山崎 隆夫、小島 寛子

経済大学大会計！
 ・東上地区大会

証券会社・金融機関でのセミナー

どうしてもQUOカードが当たらない「投資の日」タイズ

データで見る投資の実態!!

意外と知らなかった投資の実態とは？

個人投資家の年収事情

ほぼ半数が**300万円未満**

■ 300万円未満

株式を購入してよかったこと

社会経済について興味を持つようになった

● 社会経済について興味を持つようになった

知識の身に付け方

3割以上が講座やセミナー

学習方法	割合
講座やセミナーに参加	31.1%
YouTubeなど動画視聴	25.8%
書籍や雑誌を読む	20.2%
新聞記事やテレビ番組を見る	17.8%
その他	24.9%

もっと見る

NISAがいろいろ!!
投資で金持ちになるための第一歩

+YOU 東証 日本経済団体JEP
投資家としてのプロフェッショナルなサポート

投資成功の喜び

「投資の日」Twitter | @NISA | 日本証券業協会 | 証券知識普及プロジェクト | 日本経済団体連合会 | 個人投資家向け情報提供

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4つの投資Story

世代・性別・職業が異なる4組の登場人物が
それそれのライフで投資の知識を身につけ
投資を積極することで、少しずつ変化が生まれます。
その変化を4つのストーリーを通してご紹介します。

真由美(32歳)
の場合
[専業主婦]

仕事で収入は人並みですがお給料、お給料の半分は夫の生活費に回し、5割引きかえして生活が1知能の余裕があるのが現状なところ。

大輔(30歳)
の場合
[SE]

仕事で忙しく睡眠も少なくて、お給料はいい。収入は夫よりお金を貯めたいもの、このままではいけるのかもしれない。

博樹(42歳)
樹子(40歳)
の場合
[2人の親]

住宅ローンの支払いが返済を滞らせてきた。妻と、子どもを養育費や自分たちの老後の資金についてちゃんと考えたことがない。

博(67歳)
の場合
[年金生活]

妻と娘と3人暮らし。娘が稼いで暮らす。娘が一定額の金を出すが、お金のために死なないかと考えている。

きっかけ編

学ぶ編

結果編

きっかけ編

学ぶ編

結果編

きっかけ編

学ぶ編

結果編

きっかけ編

学ぶ編

結果編



投資の知
記述イベント

みんなの投資最前線

証券知識普及プロジェクト



データで見る
投資の実態

みんなのオレンジ
「投資の白」/タイス

10月16日
＜パネリストディスカッション＞

「投資最前線」カリスで個人投資家に聞く「本書の投資の魅力とは」

＜趣旨＞

65万部を35億円に！7年社会に役立つ投資をモットーに、ベンチャー企業への投資教育を目的とした会社を設立した山田さん。

テレビなどでも活躍する山田 貴浩氏・投資家としても活動中の村井さん。

個人投資家の「投資最前線」に取材すると「投資家」としての山田さんにも驚かすような内容が盛り込まれている。このような素晴らしい本をお世話し、テレビなどでお馴染みの山田貴浩さんに講演役を務めていただき、本書の「投資の魅力」に迫ります。

「投資の魅力とは何かしら」と思っている方に、ご参加いただきたいプログラムです。

＜出席者＞

山田 貴浩（シリウス・ノートーズ）（株）代表取締役社長、投資家）

村井 本菜氏（元東証市場情報、タレント）

司会 宮沢（株）東京サイン研究所 代表取締役社長）





＜モデレーター＞


深沢 真穂氏（アナウンサー）



イベントの参加申込はこちら

きっかけ編

人生設計は先送りしてばかりいたけれど…



会社で営業事務として働く青森麻由は、32歳。新卒で入社したばかりの頃は、取り扱う商品の多さに「こんなたくさんの商品を覚えるなんて無理ー!」と涙が止まっていたが、今では取引先からの感謝状も頂く、営業事務のリーダーとして活躍中。賞状が貰えた分、残業も増え、家に帰ると22時以降になる日も多いが、仕事はどんどん面白くなってきている。

付き合い年になる同い年の麻由は、大きな後悔もないが、結婚するきっかけがない。最初は彼と仕事で付き合い、二人でゆっくり会えるのは月に1~2回だ。青森麻由は、今更には人生設計を改めて考えるにあたって、そのまま更新するべきか、二人で暮らす目標を話し合った方がいいのか、いつか一人暮らし用の分譲マンションの購入を検討した方がいいのか、写った反面である。



青森麻由のストレス解消法のひとつは、ショッピング。昨日の夕方コンビニで弁当を買って、メイクを落とさずに寝てしまったが、百貨店で丁寧な接客をされたのがうれしかった。まだ人生設計が定まらずにいては自分の女子力が回復した気になる。そしてその一方で、麻由の悩みのひとつは「自分という人の認知度」だ。新しい場所に来て友人とお話ししたいのを食べに行き、職場の人間関係の整いや結婚の話、今後の人生についてなど、よりためになる話をするうちに「友達は減っていく」「月曜日は休んでメイクを怠らしてみよう」と無気力な気持ちでサージョングラスを見ては、往々にして人生設計に思いがこもって居る。その間、人生設計が定まらないのは、お酒を飲んでいるときしか将来について真剣に考えないからかもしれない。

- Four investment stories
- Information on events held around the country
- Seminars held at securities companies and financial schools
- Let's challenge! "Investment Day" quiz
- Investment reality through data
- NISA special site information
- +YOU (Tokyo Stock Exchange) introduction

(5) Let's challenge! “Investment Day” Quiz

- For the purpose of raising awareness/interest among people with low level of interest in investment, and to promote subscription to the JSDA mail magazine, “Let's challenge! ‘Investment Day’ quiz” was held on the special website.

- Application Period: September 1 (Tues) to November 30 (Mon)
- Number of Entries: 7,590 (Previous years' event participants: 531)
- Key Features: A total of 213 applicants with correct answers won prizes (Special Toushi-kun QUO Card; Wealth & Good Luck “10,000 Yen Note” Bookmark; Good Luck “Cash” Ball-Point Pen).
One entry per person.
- Conditions for Entry: Subscription to the JSDA mail magazine

◆ Special site

(6) Collaboration with JSDA Members

(i) Toshi-kun special pocket tissue distribution

- For promotion of October 4th as the “Investment Day” to people visiting the JSDA member branch offices and the officers and employees of JSDA members, special ad pocket tissue package was produced for distribution by the JSDA members.
- 73 companies (57 members, 16 special members), 414,300 packages



◆ Pocket tissue package

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

- During the “Investment Day” event period (September to November), Toshi-kun body suit and campaign banners were made available for hire to JSDA members.
- 12 companies (11 members, 1 special member)

◆ Toshi-kun body suit



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

- Display of “Investment Day” banner on JSDA members’ websites.
- 43 companies (38 members, 5 special members)

(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.
- 8 companies (7 members, 1 special member), 40 venues

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

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

(7) “Investment Day” Public Relation Events

- Distribution of “Investment Day” PR products by Hiroto Kiritani (individual investor), Kazutoshi Inano (Chairman & CEO of JSDA), and Toshi-kun.
- ◆ Date: September 29, 2015 (Tues)
11:00 - 14:00 at the lunch time
- ◆ Location: Tokyo Kotsu Kaikan, Sampling Area (2-10-1 Yurakucho, Chiyoda-ku)



◆ PR activities



◆ JSDA Facebook Page

(1) Seminars and Contents Production Targeting Younger Generation (Women)

- JSDA held seminars for younger generations interested in finance and investment (in Kobe and Kyoto).
- Published two comics and columns in collaboration with Mynavi Woman website targeting young women, and conducted PR activities through news apps, etc.



June 10, 2015 (Wed) at Kobe venue, June 23rd (Mon)
at Kyoto venue

【Topic】 “Learn from the start! Asset creation support seminar: Build a bright future with NISA”

【Lecturer】 Katsumi Ichinose
(CFP, life economy journalist)

【Number of Participants】 252



- ◆ Article distribution with news apps
 - SmartNews
 - gunosy

- ◆ Production of contents targeting young women
 - (i) Tutorial comic: You can start from 500 yen! First time investment
 - (ii) Comic: What basic investment knowledge do beginners need?

(2) Production of Video Clips for Utilization and Promotion of Junior NISA

- JSDA has produced and published video clips for the purpose of raising awareness on utilization of systems that support self-supporting asset creation such as NISA and Junior NISA.
- Samplings conducted at B3F entrance space of Tokyo Skytree Town®, Tokyo Solamachi®, in March 2016 immediately before the launch of Junior NISA 【New project for FY15】.



◆ Video clip



◆ Sampling
Novelty: Wet wipe package



◆ JSDA Facebook

【General Public】 Seminars and Events for Beginners and Inexperienced Investors

(3) Financial Knowledge Seminars for Senior Citizens 【Including Measures Against Investment Frauds】

- JSDA held “Financial Knowledge Seminar for Senior Citizens” for the purpose of avoiding troubles caused by lack of understanding about financial products and preventing investment frauds. These seminars targeted senior citizens and their family members, particularly aiming to raise the financial literacy.
- Scenes from the seminar were published on “Iki-iki” magazine for senior women, and the same contents were published on the JSDA website.

Date: December 22, 2015 (Tues)

Venue: Tokyo Shoken Building, 8F Hall (240 seat capacity)
(1-5-8 Nihonbashi-Kayabacho, Chuo-ku, Tokyo)

Program:

Part I. Rakugo Performance (14:00 - 14:30)

“Learn about Investment Fraud through Rakugo: Beware of These Tricks!”
By Hirarin Tatekawa (Rakugo performer)”

Part II. Lecture (14:45 - 15:45)

“It makes so much sense! Basics of investment for avoiding fraud”
Takahiro Uchiyama (Financial Planner)



◆ Lecture



◆ Article

For Schools

<As of end of March 2016>

[Video Clips (Seminars for University Students)]

<http://www.jsda.or.jp/manabu/seminar/financeseminar/video/index.html>

- (1) Finance is the blood for economy
- (2) What is the securities market? (i) Primary market, secondary market and market fluctuation
- (3) What is the securities market? (ii) Stock market
- (4) What is the securities market? (iii) Bond market
- (5) Role of the securities exchange and key business of securities companies
- (6) Significance of the securities market: Diversification of asset management
- (7) Significance of the securities market: Positioning of the Japanese securities markets

<http://www.jsda.or.jp/manabu/seminar/20120112163435/video.html>

- (8) Significance of life planning (i) Changes and outlook for social security
- (9) Significance of life planning (ii) Lifetime income and expenditure
- (10) Basic knowledge to make money work (i) Points on investment
- (11) Basic knowledge to make money work (ii) Representative financial products
- (12) Asset creation using tax benefits: NISA, 401k, employees' saving system
- (13) How to choose housing loans/insurances: Points on selection according to needs

[Video Clips (Classes)]

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

- (14) "Choosing Financial Assets is the Same as Choosing Fashion?"
- (15) "Let's Diversify Risk!"
- (16) "I'm a Stockholder!"
- (17) "Why Do Stock Prices Move?"
- (18) "Information is the Key!"
- (19) "Financial Statements are Companies' Report Cards?"
- (20) "What do Strong Yen or Weak Yen Mean?"
- (21) "Reasons Stock Prices Move! FX and Stock Prices"
- (22) "Why Do Interest Rates Change?"
- (23) "Reasons Stock Prices Move! Interest Rates and Stock Prices"
- (24) "What is GDP?"
- (25) "Why Does the Economy Change?"
- (26) "What is a Stock Index?"
- (27) "Lucky Grab Bags and ETFs Are the Same?"
- (28) "What Do The Companies Need?"

<http://www.jsda.or.jp/manabu/kenkyukai/video.html>

- (29) "Asset Management and Financial Products: Course Summary"
- (30) "Foreign Exchange (Strong Yen/Weak Yen)"
- (31) "The Role of Investment"
- (32) "Structure of Stock Companies: (i) A Stock Company is Born"
- (33) "Structure of Stock Companies: (ii) Stock Company and Stocks"
- (34) "What is Stock Investment?"
- (35) "Primary Market and Secondary Market"
- (36) "Structure of Bonds"
- (37) "Structure of Investment Trusts"
- (38) "Risk Management: Course Summary"
- (39) "Risk and Return"
- (40) "Diversified Investment: (i) Purpose of Diversification"
- (41) "Diversified Investment: (ii) Portfolio Approach"
- (42) What is Dollar Cost Averaging?
- (43) "Long-Term Positions, Compound Interest and Simple Interest"

For Schools

[Video Clip (Teaching Materials)]

- Junior High School Teaching Material “Let’s Form a Stock Company! A Challenge from Mr. X”

<http://www.kinyu-navi.jp/textbook/contents8/index.html>

(44) Purpose and Effect of the Teaching Material

(45) Class Tutorial

- High School Teaching Material “Three Doors to Understanding the Economy”

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

(46) Purpose and Effect of the Teaching Material

(47) Class Tutorial

- Stock Market Game

<http://kinyu-navi.jp/gakusyuGame/>

(48) Introduction to Teaching Materials

(49) Teacher Interviews on Reasons for Utilizing the Game and Its Effect

[Other]

- Games

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

(50) Quiz: Financial Economy de BINGO

For the General Public

[Video Clips (Seminars)]

“Financial Literacy Study Courses 2015”

https://www.youtube.com/playlist?list=PLIUswvnxiK9cFRwBUGr3MdMhRCXtpZ_rz

- (1) 0. Introduction
- (2) 1. Do We Really Need Life Planning/Money Planning?
- (3) 2. Let's Learn about Stock Investment!
- (4) 3. Let's Learn about Bond Investment!
- (5) 4. Let's Learn about Investment Trusts!
- (6) 5. What's So Good about NISA?

- (7) 6. Let's Learn about Features and Risks of Financial Products!
- (8) 7. Let's Think about Diversified Investment!
- (9) 8. Let's Invest with Long-Term Perspectives!
- (10) 9. Let's Use NISA!
- (11) 10. Let's Use Available Information!
- (12) 11. Let's Start Asset Management That's Right for Me

[Video Clips (Classes)]

○ Shellfish Workers' “INVEST TO THE FUTURE”

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

- (13) From 202X (Asari is 30 years old)
- (14) From 204X (Asari is 50 years old)
- (15) 3. From 205X (Asari is 60 years old)
- (16) 4. From 207X (Asari is 80 years old)
- (17) Shellfish Workers' “INVEST TO THE FUTURE” CM

○ “Hamakan Investment Management Theater”

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

- (18) “Before you start thinking ‘I don't need asset management’”
- (19) “I want to know about that - First steps in investing in stocks”
- (20) “I want to know about that - What are bonds?”
- (21) “I want to know about that - How do I start investment in investment trusts?”
- (22) “I want to know about that - Is a defined contribution pension plan necessary?”
- (23) “I want to know about that - How to take advantage of NISA for asset management”
- (24) “Hamakan Investment Management Theater” PR CM

For the General Public

[Video Clips (Classes)]

○ “Easy to Learn Securities Investment Basic Knowledge”

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

- (25) Lesson 1: Introductory Securities Investment
- (26) Lesson 2: Introductory Investment Trusts
- (27) Lesson 3: Introductory Stock Investment
- (28) Lesson 4: Introductory Bond Investment

○ “Finally starting! Junior NISA system brings value to everybody”

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

- (29) Chapter 1: Understanding the Mechanism of Income Tax
- (30) Chapter 2: Overview of the NISA system
- (31) Chapter 3: Specifics of the NISA system
- (32) Chapter 4: Avoiding mistakes with the NISA system
- (33) Chapter 5: Overview of the Junior NISA system
- (34) Chapter 6: Approaches to Inheritance Tax
- (35) Chapter 7: Integrated Taxation on Financial Income

Other

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

- (36) “Toushi-kun PR CM”
- (37) “Investment Day” Street PR Campaign

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 May 2015, JSDA participated in the panel discussion at the IFIE-IOSCO Investor Education International Conference held in Kuala Lumpur, Malaysia 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 September 2015, JSDA served as the Chair for the iterim meeting of the Asia Chapter held in Seoul, Korea.



◆ Conference



◆ Video clip of Turkish Capital Market Association (TCMA)

2. Who does what in FC/IE? ~ Major Activities ~



CPFE : National project (June 2013~)

CCFSI (BoJ: secretariat), FSA, CAA, MEXT, Academics, Financial Industry Associations (Securities, Banks, Insurance, Investment Trust, FP) and JPX
 • Financial Literacy "MAP": a 15-item list of detailed **standard** of financial knowledge for individual age group. (December 2013~)

The Securities Knowledge Proliferation Project (Feb. 2001~)

JSDA, JPX and 6 Stock Exchanges, 2 Associations
 • Joint activities for long-term and continuous promotion and enlightenment of securities knowledge
 • Support financial education for schools (junior high, high school)
 • Financial/securities knowledge for general consumers

◆ JSDA Activities

Independent Activities by JSDA

- FIEA* provides a legal basis for sound development of Financial Ins
- JSDA's "Financial Literacy & Education" activities
- Fair and Neutral Standpoint

4. Recent Development in Programing and Delivery

