



LSEG Workspace Portfolio Competition 2026

6TH ANNUAL VIRTUAL UNIVERSITY CHALLENGE

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LSEG Workspace Portfolio Competition 2026

I. Introduction

We are pleased to announce the 6th Annual Virtual University Challenge:

LSEG Workspace Portfolio Competition 2026.

The goal of this competition is for participating students to build the highest performing portfolio over a period of one month, based on a defined set of criteria. The portfolio will be built using Apps within LSEG Workspace. LSEG Workspace enables students to advance their studies, deepen their understanding of portfolio management and apply theoretical knowledge in a practical and impactful way using LSEG Workspace.

The top performing portfolios, from two sub-regions within the participating countries, will be invited to submit a report and present to a panel of judges, as Semi-Finalists of the competition, where 8 Finalists will be selected to move on to Regional. A regional panel will select three (3) winners.

II. Why a Portfolio Competition?

The competition will serve as an opportunity for students to familiarise themselves with LSEG Workspace, LSEG 's flagship solution. Through the competition, the students will:

- ✓ Advance their studies, deepen their understanding and apply their learning in an impactful way.
- ✓ Develop practical knowledge of asset management and investment workflows
- ✓ Apply financial knowledge in investments and strengthen the ability to translate financial knowledge into investment decisions
- ✓ Apply both quantitative and qualitative approaches to investment and stock selection
- ✓ Gain hands-on experience using a real-world portfolio management platform
- ✓ Understand the key risk considerations involved in portfolio construction
- ✓ Obtain free access into LSEG Workspace for the duration of the competition
- ✓ Network with a panel of experts for the top performers
- ✓ Obtain a Certificate of Completion and attractive opportunities for top performers
- ✓ Build industry-relevant skills valued by employers in the financial sector
- ✓ Enhance their resumes enabling market readiness

Designed for students and academic staff, LSEG Workspace combines exceptional data, news and content coverage with cutting-edge web technology that is fast, light and intuitive. It gives students a richer, more interactive learning experience and surfaces expertly vetted, reliable and meaningful data quickly.

Each participant will receive individual access to LSEG Workspace for Students as well as hands-on help from LSEG specialists. To support students throughout the competition, LSEG Specialists will conduct live knowledge sessions dedicated to learning and development of LSEG Workspace. This will, of course, be in addition to the access provided to all the self-paced digital learning material on the Learning Centre.

III. University Eligibility to Participate

The LSEG Workspace Portfolio Competition runs, this year, in limited countries where LSEG currently has offices. These countries are: Bahrain, Cyprus, Egypt, Greece, Lebanon, Qatar, Saudi Arabia, South Africa, and United Arab Emirates.

Dividing the countries into two sub-regions:

Sub-region 1: Cyprus, Egypt, Greece, Lebanon and South Africa

Sub-region 2: Bahrain, Qatar, Saudi Arabia, and United Arab Emirates

The competition is open to Business Schools at client universities in the above-mentioned countries. It is also open to Business Schools that are members of AACSB or where the university satisfies a top quartile in QS World Ranking.

IV. Participation and Briefing Sessions

Faculty

Faculty members, of eligible universities, are invited to join a faculty briefing session, where rules and regulations are explained. Faculty will **nominate up to 5 students, per university**. Nominated students should have some knowledge and interest in the financial markets, possess good English communication skills, and have a commitment to participate and complete the university competition. The nominees need to register themselves on the student registration page, which will be shared with faculty who nominate students.

Students

Students need to complete the registration form

Nominated students need to register themselves on the University Competition student registration page. The registration form is standard. The following fields can be filled as such:

Job Title: **Student**

Company: **Respective university name**

Professor (or Staff) Name: **Name of Professor (or Staff)** who nominated the student

Once they submit the registration form, students:

1. Receive a confirmation email to verify their email address and complete registration.
2. Will be redirected to **register themselves to one of two mandatory briefing sessions** that suits their schedule.

LSEG Uni Competition Student Briefing on 6th October at 16:00 (GMT+4)

LSEG Uni Competition Student Briefing on 7th October at 13:00 (GMT +4)

Registered students are required to join the **Uni Competition Student Briefing** session where the competition objectives, rules, regulations and timing will be explained. Students will be vetted against the nominations from their faculty and will be given access to LSEG Workspace as well as access to digital self-paced training material.

V. Portfolio Security Selection Criteria

Students are expected to build a portfolio of stocks from a chosen index, in PAL and PORTF native applications, where the initial Holding Date should be on or before the starting date of October 13.

Securities selection will be limited to the following criteria:

- **iShares Russell 1000 ETF**
- ESG score ≥ 50
- No single security can exceed 10% weight in the portfolio
- Selection is not to exceed 50 stocks

Failure to adhere to the selection criteria, **may result in portfolio disqualification.**

VI. Naming Your Portfolio

Name your portfolio using the naming convention:

University Name – Country – Student Name

Example: *The LSEG University - UAE – Rula Asfour*

Ensure that there is no extra space at the end of your name, otherwise, the competition scripts might reject your portfolio.

VII. Portfolio Start Date

The Portfolio Submission deadline is **October 13, 2026**. Students need to ensure that the Portfolio has a Holding Date that is created on, or before October 13, 2026, for the competition scripts to calculate the returns correctly through November 12, 2026, the end of the competition.

VIII. Rebalancing Your Portfolio

Your portfolio composition is based on holding dates, which are the dates you added or removed any security. The key in rebalancing is to add a new holding date on the day you are making the change. Backdating a change to your portfolio, will result in disqualification. Check out the **Rebalancing Portfolios** guide for exact steps on how to add or remove or simply rebalance the weights of your securities.

Create a new holding date, when modifying your portfolio, by clicking on the “Add New Statement” button for a new holdings date. **Backdating a change is illegal.**

IX. Portfolio Performance Evaluation Criteria

Portfolios will be evaluated on different variables, equally weighted:

Portfolio Return 25% - A portfolio return is a reference to how much an investment portfolio gains or loses in a given period of time. Portfolio return refers to the gain or loss realized by an investment portfolio containing several types of investments. Portfolios aim to deliver returns based on the stated objectives of the investment strategy, as well as the risk tolerance of the type of investors targeted by the portfolio.

Selection Effect 25% - The selection effect in portfolio management is a measure used to evaluate the performance of a portfolio manager’s stock-picking ability.

Allocation Effect 25% - The allocation effect in portfolio management refers to the proportion of different sectors within an investment portfolio.

Sharpe Ratio 25% - The Sharpe ratio compares the return of an investment with its risk. It's a mathematical expression of the insight that excess returns over a period of time may signify more volatility and risk, rather than investing skill.

Portfolio Scoring

Rating	Portfolio Returns 25%	Selection Effect 25%	Allocation Effect 25%	Sharpe Ratio 25%
5	Top 20%	Top 20%	Top 20%	Top 20%
4	21 - 40%	21 - 40%	21 - 40%	21 - 40%
3	41 - 60%	41 - 60%	41 - 60%	41 - 60%
2	61 - 80%	61 - 80%	61 - 80%	61 - 80%
1	Bottom 20%	Bottom 20%	Bottom 20%	Bottom 20%

In case of an equal final rating between participants, *Portfolio Return* percentage will be used to differentiate ranking.

Participants will be invited to regular knowledge sharing and Q&A sessions providing opportunities to learn from LSEG specialists and advisors and to ask questions, as well as to exchange insights with their peers. While attendance to these meetings is optional, participation is highly recommended. Recordings to these weekly meetings will be shared within 48 hours with the participants, and recording links posted on the competition page.

At the end of the competition, after access to LSEG Workspace closes on November 12, Semi-Finalists, with the top-performing portfolios, as per the above-mentioned **Portfolio Performance Evaluation Criteria**, from each sub-region will be announced on November 13. The Semi-Finalists will be requested to submit a report describing their selection process, the sustainability factor strategy and the tools used, if any. Semi-Finalists will be invited to present their report to a Panel of Judges on November 19, 2026, where finalists will be selected to advance to Regional. The finalists will present to a final panel on November 24, and Three (3) winners will be announced on November 25.

Top performers, based solely on their *Performance Return* will be announced weekly. The announcements will also include Selection Effect, Allocation Effect and Sharpe Ratio **medians**, providing participants with additional benchmarking insights.

The Sustainability Factor Strategy

The consideration of Environmental, Social, and Governance (ESG) factors has become an integral part of the investment process. Asset owners and investment managers continue to enhance their approaches to incorporating ESG criteria into investment analysis and decision-making, ensuring that responsible investment principles are embedded within their strategies and practices.

As part of their presentations, participants with top-performing portfolios are required to clearly present the methodology used to incorporate ESG factors into their investment models (e.g., best-in-class, thematic investing, ESG integration, exclusionary screening, etc.). Participants should be prepared to demonstrate how ESG considerations were incorporated into the following areas:

- 1. Investment Strategy** – Explain how ESG factors influenced the overall investment strategy and objectives
- 2. Integration and Implementation** – Describe how ESG criteria were incorporated throughout the portfolio construction process, including security selection, portfolio allocation, risk assessment, and ongoing monitoring.
- 3. Results and Performance Analysis** – Present the impact of ESG integration on portfolio outcomes and performance metrics, demonstrating how ESG considerations contributed to their investment decisions and portfolio results.

X. Jury Evaluation

The panel will announce finalists and winners based on portfolio performance, knowledge and methodology, Responsible investment and ESG Factor Strategy, and presentation skills, as per the following Rubric:

Rubric	Proficient (5)	Developing (4-3)	Emerging (2-1)	
Portfolio Score	Portfolio earns an excellent Portfolio Score of 5 .	Portfolio earns a good Portfolio Score of 2 to below 5 .	Portfolio earns a Portfolio Score below 2 .	30%
Knowledge & Methodology	Demonstrates a comprehensive understanding of the topic and clearly articulates a rigorous, well-structured methodology used in the security selection process. The presentation includes a distinctive “Wow Factor” through the effective use of data analysis, technology, innovation, or advanced insights.	Demonstrates a good understanding of the topic and explains a logical methodology for the security selection process. Analysis is generally sound but may lack depth, innovation, or complete justification.	Demonstrates limited understanding of the topic. The selection process lacks a clear, consistent, or well-supported methodology, resulting in weak analysis and justification.	25%
ESG Factor Strategy	Clearly explains responsible investing principles and demonstrates how ESG considerations influenced security selection, portfolio allocation, and key fundamental ratios. ESG factors are thoughtfully and innovatively integrated throughout the investment process.	Demonstrates a good understanding of responsible investing and ESG principles. Explains how ESG considerations influenced security selection, but provides limited explanation of their impact on portfolio allocation or key fundamental ratios.	Demonstrates limited understanding of responsible investing and ESG principles. Fails to clearly explain how ESG considerations influenced investment decisions, allocation, or fundamental ratios.	25%
Presentation, Language, Delivery, and Timing	Delivers a highly professional, engaging, and well-organized presentation. Communicates clearly and confidently, beginning with a strong introduction and maintaining a logical flow throughout. Uses accurate and sophisticated terminology, effective visual aids, and virtually error-free language while adhering to the allotted time.	Delivers a clear and organized presentation with an appropriate introduction and logical structure. Uses relevant terminology and visual aids effectively. Minor language or delivery issues may be present, but the presentation remains professional and is completed within the allotted time.	Presentation lacks clarity, organization, or a clear introduction, with frequent grammatical errors, inaccurate terminology, ineffective visual aids, or poor time management.	20%
Total Score				

XI. Competition Timeline

Wed September 9 Student Registration of Nominees Opens

Tues October 6 Student Registration Deadline. Last day for student registration.

Tues October 6 and Wed Oct 7 Student Briefing Sessions. Students can select one.

Thurs October 8 Access to LSEG Workspace is granted to registered participants.

Mon October 12 Knowledge Sessions with Q&A - *Company Overview & Financials*.

Tues October 13 Portfolio Submission Deadline. Security returns tracking starts.

Fri October 16 Knowledge Sessions with Q&A - *Charts & News*

Tues October 20 Knowledge Sessions with Q&A - *ESG*

Wed October 21 Knowledge Sessions with Q&A - *Portfolio Analytics*

Tues October 27 TBC Student Knowledge Sharing Session with Q&A

Thurs Nov 12 Close access to LSEG Workspace

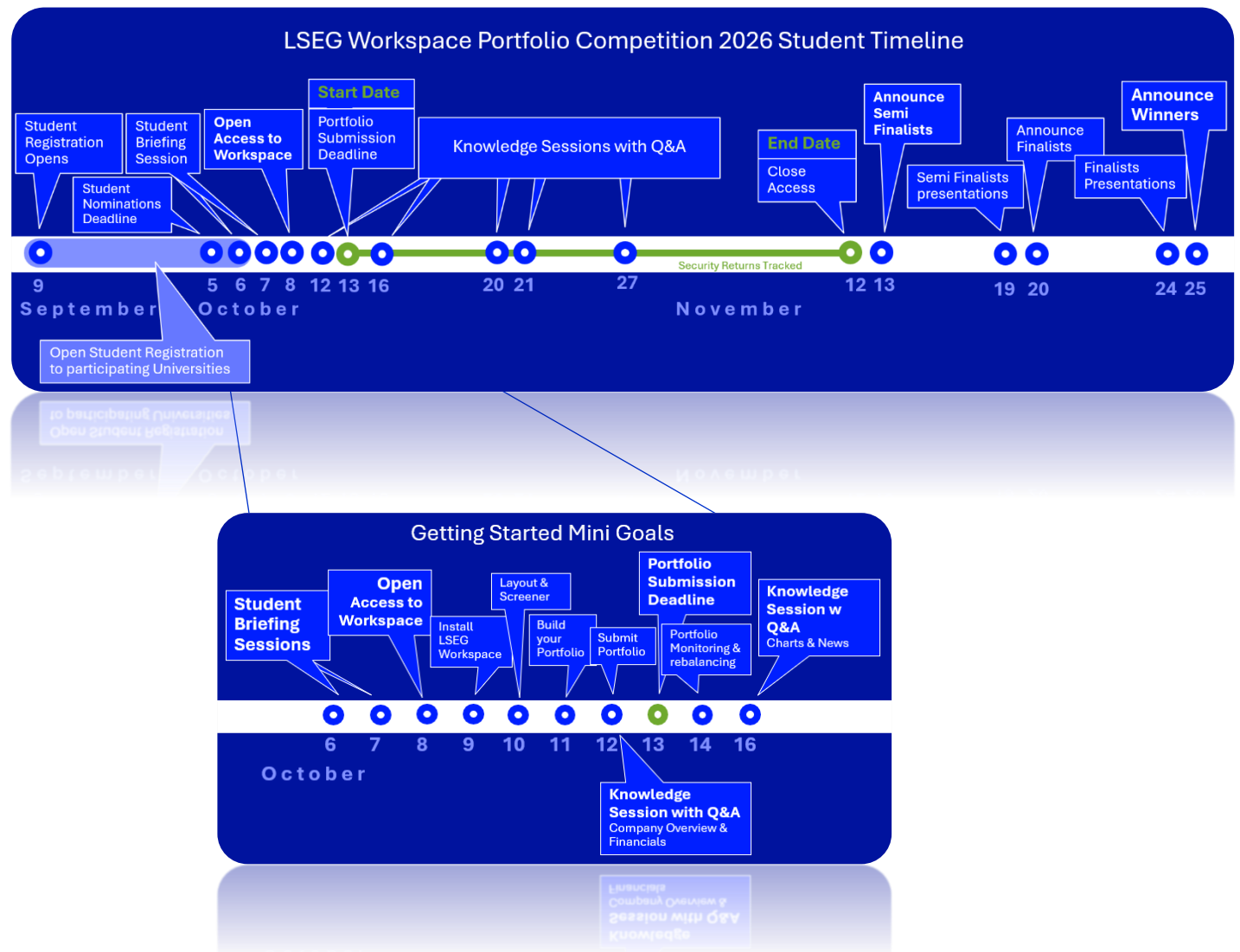
Fri Nov 13 Announce Semi Finalists – Semi Finalists Briefing session

Thurs Nov 19 Semi Finalists present to a panel

Fri Nov 20 Announce Finalists

Tues Nov 24 Finalists present to a panel

Wed Nov 25 Announce Winners



XII. Awards

- ✓ **All participants** will receive a *Certificate of Completion* in recognition of their participation in the competition.
- ✓ **Finalists and winners** will receive a special certificate recognizing their performance and achievement.
- ✓ The top **three (3) winners** will be offered an opportunity for an internship with LSEG offices, subject to customary interview process and local legal requirements, to be completed by September 2027.

XIII. Getting Started and Tutorials

Along with the University Brief, and the Frequently Asked Questions, tutorial videos are posted on the Competition Page, to help participants learn how to use LSEG Workspace and create and submit a portfolio. Links to optional deep dive training into LSEG Workspace is also provided. For other Tutorials, on LSEG Workspace please visit [LSEG's Learning Catalogue](#)

Visit [LSEG Certification Programs](#) to broaden your knowledge.

XIV. Keep In Mind

Portfolio needs to be accurate and within the competition regulations at all times. Here is a quick checklist to keep in mind:

- Your portfolio name follows the convention: **University Name – Country – Your Name**
- No extra space at the end of your portfolio name
- All the selected securities belong to **iShares Russell 1000 ETF**
- All the selected securities have an ESG score ≥ 50
- The weight of every security does not exceed the limit of 10%
- The total number of securities does not exceed 50 stocks
- Your portfolio's first holding date is on or before October 13
- You submit your portfolio on or before the deadline which is October 13
- No backdating of any modification to your portfolio

Continue to monitor your portfolio. Oftentimes an **ESG** value might change, or a security might be dropped or added to an index. Your portfolio needs to comply at all times. Failure to comply with the competition rules and regulations, **may result in portfolio disqualification**.

XV. Competition Advisors

LSEG has a team dedicated to the University Virtual Challenge:

- Rula Asfour – Project Manager
- Abdelmaguid Elnaggar – Account Manager

Along with a team of Customer Success Managers and Specialists.

XVI. Contact Us

We look forward to welcoming student participants.

Questions? Please contact us at: UniCompetitionHelp@lseg.com

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Need Help?

Please email us at UniCompetitionHelp@lseg.com