

# **Student Investment Fund**

## **Class of 2017-18 Application for Admissions**

**FNCE 4491, Student Investment Fund Seminar: Security Analysis, Fall 2017 (4 units)**  
**FNCE 4492, Student Investment Fund Seminar: Portfolio Management, Spring 2018 (4 units)**  
**FNCE 4493, Investment Research Lab, Spring 2018 (2 units)**

**Instructors: Dr. Chun I Lee Phone: 310-338-5162**

### **Background:**

In 2002, the Loyola Marymount University School of Business Administration established the Student Investment Fund (SIF) with the purpose of providing students with hands-on experience in investment. Since the fall of 2008, the fund has been managed by 12 students in the one-year three-course SIF Security Analysis and Portfolio Management Seminars.

The purpose of the seminars is fourfold:

1. To provide a group of twelve undergraduate students with hands-on experience in managing the University's Student Investment Fund;
2. To provide an academic context within which to learn the theory and practice of security analysis and portfolio management;
3. To enhance the academic training with frequent interaction with individuals and institutions engaged in the money management industry; and
4. To understand portfolio composition and engage in performance measurement, culminating with the production and presentation of an Annual Report in spring 2018.

### **Requirements:**

Eligible students must be currently enrolled in the College of Business Administration and be in good academic standing with a minimum cumulative 3.3 GPA at the time of application. Students who are graduating in December 2017 are not eligible since the class requires a full one-year commitment. All applicants are also required to have successfully completed FNCE 3400 or FNCE3410 by the end of spring 2017 semester. In addition, the class requires daytime availability on Monday (and periodically on other days of the week) throughout the 2017-18 academic year so that student managers can meet with each other and make off-campus company visits during business hours. To be formerly accepted into the program, the accepted applicants must go through a two-day training on the Fridays of 3/17 and 4/14. Accepted students should anticipate a 10- to 15-hour daytime commitment per week.

Candidates must demonstrate the following qualities:

1. Strong desire to learn
2. Serious commitment in all areas of investment management
3. Outstanding teamwork skills
4. Highly professional demeanor

### **Commitment:**

After the proper training and preparation in March and April, the selected student managers will assume full fund management responsibilities from the current SIF class of 2017 at the end of spring 2017

### **Selection Process:**

The accepted applicants will be notified via email by the instructor within two weeks following the application deadline to schedule an in-person interview

## **Application for Admission:**

All candidates should provide one copy of an application that should not exceed three pages in length organized as follows:

1. A copy of your resume and CAPP report
2. A typed, double-spaced one-page Personal Statement addressing the following three questions:
  - How will your academic and professional experiences contribute to the seminars?
  - How would your personal attributes add value and diversity to the classroom environment, security analysis, and portfolio management?
  - How would the experience of working as a SIF manager contribute to your career objectives?
3. Basic student information (attached in the invitation email, to be emailed directly to Dr. Lee [clee@lmu.edu](mailto:clee@lmu.edu))

**IMPORTANT: \*\*\*\* Application Deadline\*\*\*\***

**Wednesday, February 8, 2017** at 12 noon to Diana Asai in Hilton 209A.  
Late submissions will not be considered.