

Student Investment Fund

Class of 2017 Application for Admissions

FNCE 4491, Student Investment Fund Seminar: Security Analysis, Fall 2016 (3 units)
FNCE 4492, Student Investment Fund Seminar: Portfolio Management, Spring 2017 (3 units)
FNCE 4493, Investment Research Lab, Spring 2017 (3 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 2017.

Requirements:

Eligible students must be currently enrolled in the College of Business Administration and be in good academic standing with a minimum cumulative 3.4 GPA at the time of application. Students who are graduating in December 2016 are not eligible since the class requires a full one-year commitment. All applicants are also required to have successfully completed FNCE3410 by the end of spring 2016 semester. In addition, the class requires daytime availability on Tuesday (and periodically on other days of the week) throughout the 2016-17 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 3/11 and 4/8. Accepted students should anticipate a 10- to 15-hour daytime commitment per week.

Candidates must demonstrate the following qualities:

1. Serious commitment in all areas of investment management
2. Outstanding teamwork skills
3. Strong work ethic
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 2016 at the end of Spring 2016.

Selection Process:

Following the application deadline and after a one-on-one interview with the instructor, the accepted applicants will be notified within two weeks.

Application for Admission:

All candidates should provide one copy of an application 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?

Additionally, you need to email Dr. Lee, clee@lmu.edu, with “2017 SIF Application” in the subject line, your basic information in an attached Excel file. The template for the Excel file will be attached in the invitation email you receive from Dr. Lee.

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

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