Hands-on Large-Cap Investment Course: Practicum in Portfolio Management

About the Class and How to Apply for the Spring 2019 Semester

Overview:

Baylor has a student-managed investment fund comprised of large capitalization (large-cap) stocks which is now valued at approximately $8.4 million. Students in the class are directly responsible for managing the portfolio, while learning the techniques used by professionals to analyze and select individual stocks. Each student will also learn how to use Bloomberg, FactSet, Thomson Eikon and other resources commonly used in the investment management industry.

The Class:

Time: Mondays, 5:00-7:30pm
Location: Hodges Financial Markets Center
Structure: Designed after the operational format of a funds management firm and built around student participation.

The course primarily consists of market sector teams preparing and presenting to the class detailed reports on stocks in their sector. Every class member is involved in the discussion of each stock. Following the presentation and discussion, the team makes a recommendation on the stocks they presented. The class votes and the decisions of the class are implemented.

For a better understanding of the course, you are welcome to sit through all or part of a class session this semester! Just come to the Financial Markets Center any Monday evening before 5:00pm and let the professor know you are there.

Professors:

- Brandon Troegle, CFA®, is a Managing Director and portfolio manager with Hillcrest Asset Management, focusing on the firm's securities selections across various strategies. Before joining Hillcrest, Brandon was an equity analyst at Morningstar. Prior to Morningstar, he worked for Luther King Capital Management and Bank of America.
- Wesley Wright, CFA®, is a Portfolio Manager at Hillcrest, focusing on the firm's International Value Strategy. Prior to joining Hillcrest, Wesley was a Portfolio Manager at Dreman Value Management in New York where he managed the firm's International Value product and U.S. All Cap Value product.

How to Apply: Complete the online application at https://www.baylor.edu/business/financialmarkets/apply.
In addition to the usual contact and background information you will need to provide:

1. Statements of why you wish to take the course and your career plans/goals
2. Description(s) of any investment and/or finance-related experience
3. A description of a significant academic and/or personal achievement you would like the selection committee to consider
4. Uploaded copies of your current resume and current unofficial transcript

The online application will be available from Monday, October 8 until 8:00pm, Monday, October 22.

Enrollment is limited to 15 students, graduate and/or undergraduate, each with a strong academic record and an interest in investments. Applicants will be evaluated by a Finance faculty committee chaired by Dr. Shane Underwood, Associate Professor of Finance and Chair of the Board of Trustees of the Investment Fund.

For More Information: Contact Dr. Shane Underwood at Shane_Underwood@Baylor.edu or go to: http://www.baylor.edu/business/financial_markets,

* Note: Applicants must have completed an investments course (e.g., FIN 4365 or FIN 5365) or take it concurrently with the Practicum.