

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

## About the Course and How to Apply for the Fall 2019 Semester

### Overview:

Baylor has a student-managed investment fund comprised of large capitalization (large-cap) stocks which is now valued at approximately \$7.9 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 go to the Financial Markets Center any Monday evening before 5:00pm and let the professor know you are there.*

### Professor:

- Brandon Troegle, CFA®, CAIA® is a Managing Director and portfolio manager with Hillcrest Asset Management, focusing on the firm's securities selection and portfolio construction across various strategies. Before joining Hillcrest, Brandon held analyst roles at Morningstar and Bank of America.

### 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 an 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 deadline for submission is Noon, Tuesday, March 26.

Enrollment is limited to 15 graduate and undergraduate business students with a minimum 3.2 GPA, a strong academic record and an interest in investments\*. Applicants will be evaluated by a Finance faculty committee.

**For More Information go to:** [http://www.baylor.edu/business/financial\\_markets](http://www.baylor.edu/business/financial_markets),

\* Note: Course Pre-requisite: An investments course (e.g., FIN 4365 or FIN 5365) or equivalent coursework or experience