

Website Overhaul

SIFway Surfers

Zach Burrows

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Student Investment Funds

Comparisons:

<https://nittanylionfund.psu.edu/>

<https://www.anderson.ucla.edu/about/centers/price-center-for-entrepreneurship-and-innovation/for-students/student-investment-fund>

<http://stanfordblyth.com/>

<https://tigerinvestments.princeton.edu/>

<https://www.whartonimclub.com/wimf/>

<https://brownsrif.squarespace.com/>

Eccles:

<https://eccles.utah.edu/student-investment-fund/>

Institute of Advanced Investment Management:

https://www.advancedinvesting.org/undergraduate-student-investment-fund/#2010_2015

Overview of Changes

- Analyst bio/headshots, linkedin, email and other links
- Portfolio holdings
 - List/graphs/gain/loss
 - Links to yahoo finance
- Previous Projects/Strategies
- Macro updates
- Portfolio Updates
- Previous reports
- Funds should include more info on risk factors and KPIs

Competitions and Awards

Nothing inherently wrong with Competitions & Awards Page.

Want to make more condensed, current format is lengthy.

Add links to challenges/competitions so viewers can click to learn more about them.

The screenshot shows the top navigation bar of the David Eccles School of Business website. The navigation menu includes: Home, About, Current Holdings, Historical Performance, Trading Floor Times, and a search icon. Below the navigation bar, the page title is "Competitions & Awards". The main content area contains the following text and lists:

Members of the Student Investment Fund, along with other finance students at the David Eccles School of Business, have participated in a number of international competitions.

Fred Dickson Memorial Award

The Fred Dickson Award recognizes the most outstanding university participating in D. A. Davidson's Student Investment Program.

- 2015, inaugural award recipient

Chartered Financial Analyst Research Challenge

Students from over 800 universities globally participate in the CFA Research Challenge's equity research competition. Competitions begin at the local level with winning teams progressing to international competitions.

- 2018, second place Utah
- 2016, first and second place Utah; participated in the Americas competition (Chicago)
- 2015, first and second place Utah; participated in the Americas competition (Atlanta, GA)
- 2014, first place Utah; advanced to semi-finals of the Americas competition (Denver, CO)
- 2013, first place Utah; participated in the Americas competition (Toronto, Canada)
- 2012, second place Utah
- 2011, second place Utah
- 2010, second place Utah

Revised Competitions and Awards

Changed formatting to be more uniform and less black/white.

Added clickable links to each header of the award/competition so any viewers can view the award/competition. - Some awards don't have website/any domain to view so we could add an image link to view the award.

If possible, want to add pictures in of SIF groups who went to the competitions and/or won award.

Competitions & Awards



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National Investment Banking Competition

The National Investment Banking Competition attracts several hundred teams of students from around the world in an investment banking case competition. Forty finalist teams are invited to Vancouver to compete.

- > 2014, finalist
- > 2013, finalist

Redefining Investment Strategy Education Conference

The RISE conference is the world's largest student investment conference. The conference sponsors a portfolio competition.

- > 2014, winner, alternative strategy

Current Student Analysts

- Current page is very white and empty
- Analysts are listed as of last year
- Lack of bio's, link to portfolio, linkedIn, other work, etc.
- No headshots showcasing analysts

The screenshot shows the website for the David Eccles School of Business. The header includes the school's logo and navigation links: Home, About, Current Holdings, Historical Performance, Trading Floor Times, and a search icon. The main content area is titled "Current Student Investment Fund Analysts 2022-2023" and lists two columns of names. The footer contains the school's logo, contact information, and social media icons.

David Eccles School of Business
THE UNIVERSITY OF UTAH

Home About Current Holdings Historical Performance Trading Floor Times

Current Student Investment Fund Analysts 2022-2023

Nicole Albro	Emma Hughes
Sophia Ashaboglu	Jay Jensen
Stanford Ballard	Thomas Justice
Luke Bennett	Alex Larson
Jake Bisk	Caroline McDonough
Elle Bryan	Tony Muriel
Ernesto Bustillos	Kacey Tollefson
Spencer Fletcher	Tyler Young
Abram Gubler	Cathleen Zhang
Marie Gulstad	Catherine Ziegler

801-581-7676 • Contact • Eccles Directory • IT Support • Intranet • Give

Spencer Fox Eccles Business Building, 1655 East Campus Center Drive, Salt Lake City, Utah 84112-8939

Revised Student Analysts

- Added headshots for faculty and students (Analysts)
- Included links to LinkedIn's, personal websites, etc.
- Optional to include other info such as email address, major, current year, etc. but wanted class opinion
- Included a google form at end of presentation for all students to fill out for their analyst profile in website
- Should we sort analysts into groups based on in class groups? -This could show each ones investment style

Faculty



Dr. Jonathan Brogaard
Professor



Tyler Young
Teachers Assistant

Analysts



Dylan Mingo



Zach Burrows



Rich Schettler

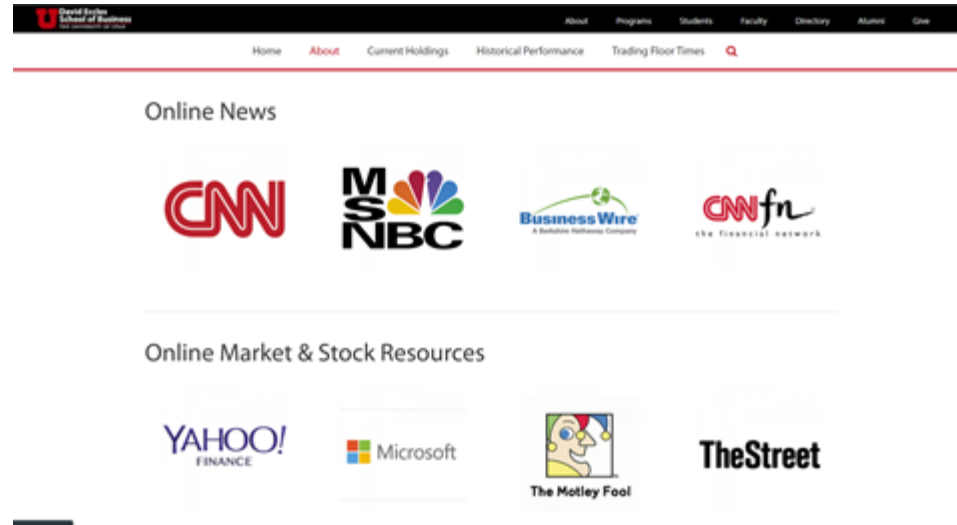
Financial Resources

Current financial resources page include online news, markets, resources and exchanges.

Found that there were resources missing such as EDGAR.

Formatting was long and wanted to condense into smaller buckets/collapsible menus for different types of resources.

Want to add tutorial/guide for some of most commonly used resources.



Revised Financial Resources

Took out websites that are not relevant to research.

Added additional resources such as EDGAR, Bloomberg, and S&P Global Market Intelligence.

All websites/resources allow a clickable link to the website or resource.

Other Resources



Exchanges



Additional Training Guides

In website added in sections with downloadable PDF guides for using both Bloomberg Terminal and Capital IQ.

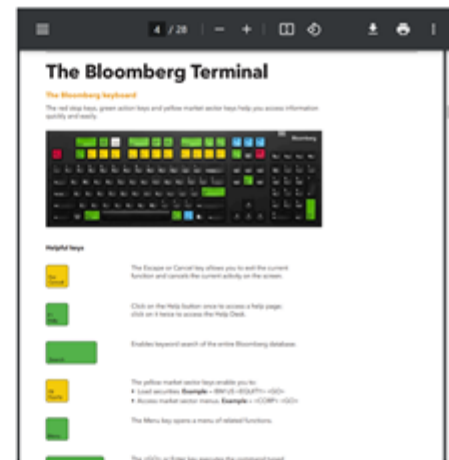
- Bloomberg Includes: common functions, how to export data, basic navigation, Bloomberg Market Concepts certification course, etc.
- Capital IQ Includes: how to navigate and use excel plug in, shortcut keys, how to build formulas, etc.

Bloomberg & Capital IQ Training Resources



20219C-SPCQ-Excel-Plug-in-Manual

Download



Getting-Started-Guide-for-Students-Bloomberg-Terminal-1

Download

Former Student Analysts

Page layout is shown as dropdown menu organizing previous analysts alphabetically by their first name.

Gets the job done but organizing by year in SIF would be better.

Not justifiable to take up a whole page on website just to display analyst's names.

A	
Agrawal, Suneeti	2007-2008
Akagi, Bryce	2004-2005
Alburges, Saray	1998-1999
Allen, Jennifer	2004-2005
Allen, Lewis	2005-2006
Allen, Connor	2014-2015
Allen, Jim	2017-2018
Anderson, Von	2002-2003
Anderson, Von	2002-2003
Anderson, Aaron	2011-2012
Anderson, Jay T	2015-2016
Anderson, Austin	2016-2017
Anderson, Emma	2019-2020
Andrus, Clay	2009-2010
Anselmo, Chad	2000-2001
Arneson, Chase	2010-2011
Ashton, Ted	2002-2003
Asplund, Erik	2019-2020
Atkinson, Ashley	2012-2013
Azmi, Farah	2012-2013

Former Student Investment Fund Analysts

A	B	C
D	E	F
G	H	I
J	K	L
M	N	O
P	Q	R
S	T	U
V	W	X
Y	Z	

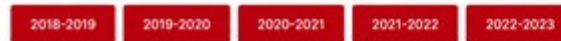
Changes to Former Student Analysts

Previous Analysts

The Student Investment Fund is proud to have over 450+ alumni that participated in the fund's initiative since 1998. Our alumni have gone on to work at some of top firms across banking, wealth management, accounting and finance as well as many fortune 500 companies.



2018 - 2023 Analysts:



2008 - 2018 Analysts:



1998 - 2008 Analysts:



Added brief description of how many alumni have gone through SIF and top firms where they have obtained a full time position.

Rather than being sorted alphabetically, analysts are sorted by their class year in clickable buttons. Want to update to drop down menus rather than having page filled with buttons.

Former Student Analysts Cont.

When a viewer clicks on the year button from the previous slide it will bring them to a page which displays the analysts from that year.

Below analysts is a section with a downloadable PDF showing off their annual report for that year.

Possible things to still include: analyst bios, emails/linkedin's, short section describing investment thesis, and section describing where they are now.

H2 2022-2023 Analysts:

- > Nicole Albro
- > Sophia Ashaboglu
- > Stanford Ballard
- > Luke Bennett
- > Jake Bisk
- > Elle Bryan
- > Ernesto Bustillos
- > Spencer Fletcher
- > Abram Gubler
- > Marie Gulstad
- > Emma Hughes
- > Jay Jensen
- > Thomas Justice
- > Alex Larson
- > Caroline McDonough
- > Tony Muriel
- > Kacey Tollefson
- > Tyler Young
- > Cathleen Zhang
- > Catherine Ziegler



Fund Description & Bylaws

Currently the bylaws are just typed out on our website.

Updated to be in a downloadable PDF format so current analysts, shareholders, faculty members, etc. can have a saved copy

Fund Description & Bylaws

Purpose

The Student Investment Fund (Fund) provides students in the David Eccles School of Business (DESB) at the University of Utah with "hands on" investment experience. Students participating in the Fund will learn how to evaluate potential investments and how to structure a portfolio. The focus of the Fund will be on growth, with a three-to-five year investment horizon. The Fund will operate as a not-for-profit organization.

Types of Investments

Investments are limited to securities listed on US exchanges, including NASDAQ or other major international exchanges. Fund investments are limited to common and preferred stock, including ADRs and other exchange-traded collateralized equity instruments, exchange-listed corporate bonds, mutual funds and money market accounts, and US Treasury instruments. Margin purchases, short sales, and investment in derivatives are not permitted.

Annual Report

Each year, the students will prepare an Annual Report of the Fund's activities. The report will be distributed to the Dean of the DESB, the Finance Department Chair, and to other interested parties.

Annual Audit

The Fund will be audited annually by a group of students from the accounting society Beta Alpha Psi under the supervision of their faculty advisor.

Support for the Fund

The Finance Department and the DESB will provide reasonable support for the Fund, including the type of support offered for regular departmental classes such as photocopying, computer support, etc.

Historical Performance

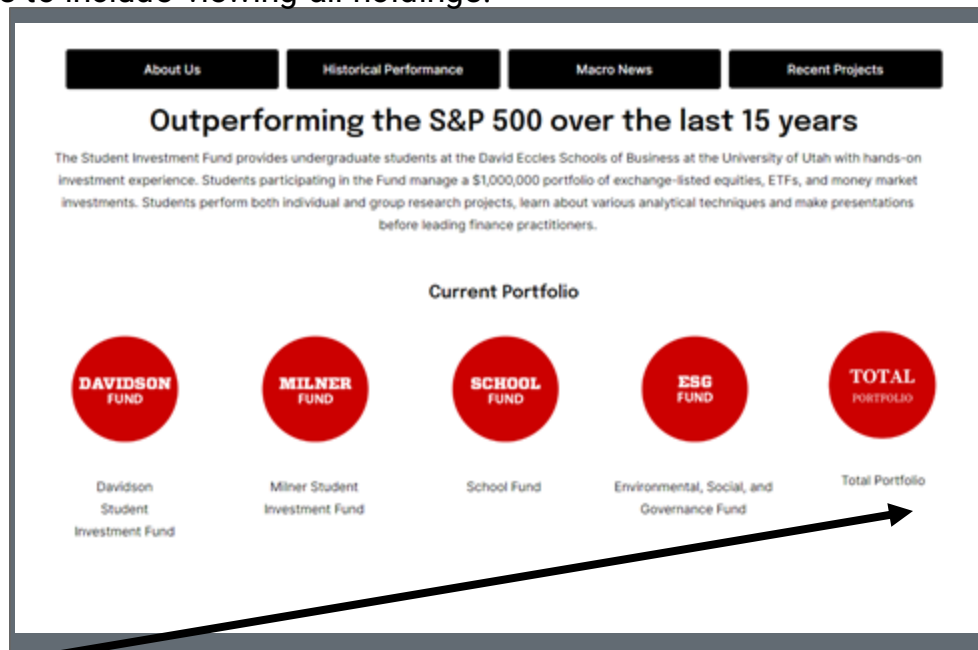
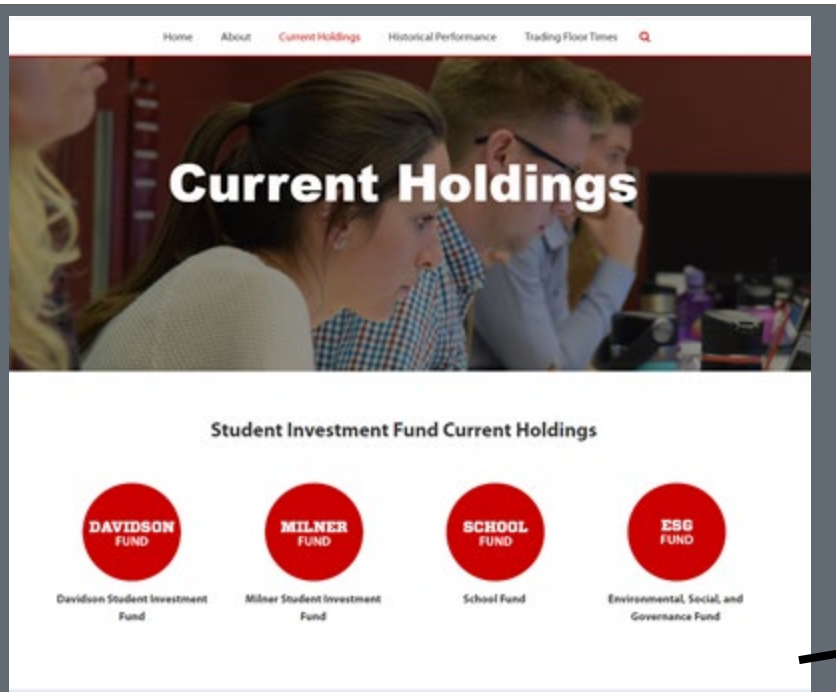
Liked the current section provided on historical performance.

Took inspiration from how it was formatted on both Institute of Advanced Investment Management as well as current SIF.



Current Holdings

Expand options to include viewing all holdings.



A look at what each fund could entail

Things to keep:

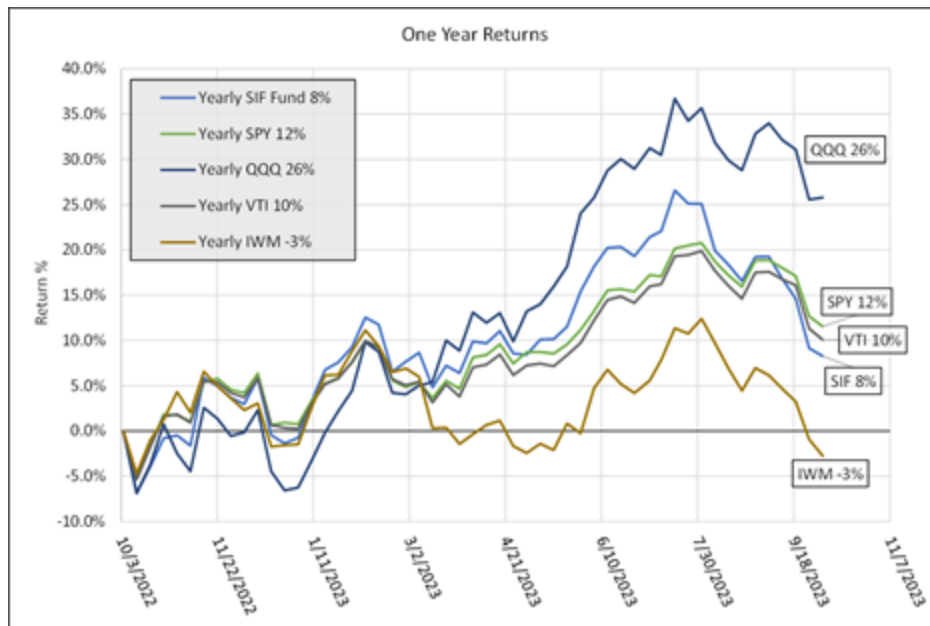
- Stock Ticker
- Company
- Current Price
- Number of Shares
- Current Value
- Day Change

Things to improve:

- Each stock linked to uploaded trading strategy, showing why and how many shares were purchased.
 - Can have multiple trading strategies linked, only one listing per stock per fund
- Fund performance tracking
 - Chart for each fund
 - Sector allocation
 - Fundamentals
 - Beta
 - Sharpe
 - Treynor
 - Alpha
- Each fund's buy/sell history

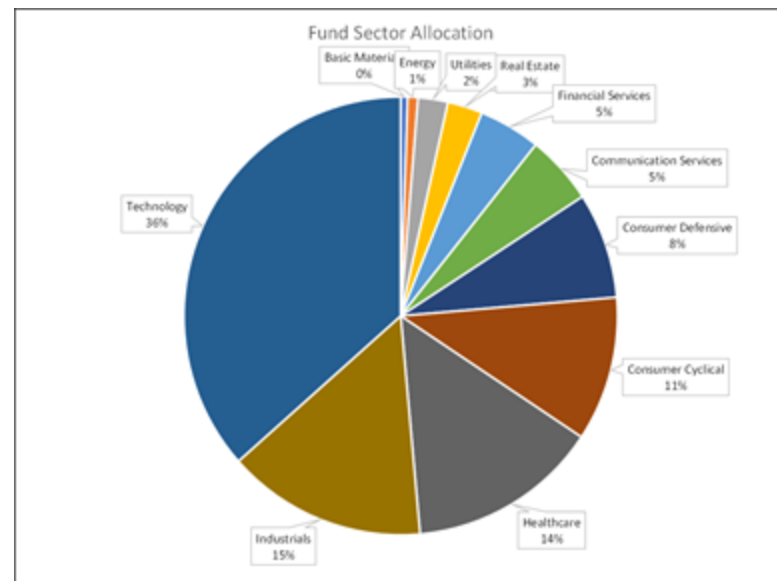
How it all connects together - Charts

- Ability to quickly compare returns visually against index etfs, and other funds
- Ability to toggle which funds / etfs we are comparing against
- Gives a quick visual snapshot of how each fund, and the portfolio as a whole are performing



How it all connects together - Allocation

- Ability to quickly see allocation of capital
- Gives a quick snapshot into where each fund, and the portfolio as a whole are invested in
- Ability to compare fund allocation with fund purpose



How it all connects together – Ratios

- See the fund as a whole, or each individual fund
- Allows for quick snapshots into each fund
- Allows us to check and rebalance as necessary to remain with parameter goals

Fund	Alpha	Beta	Sharpe	Treynor	Std Dev	R2	Others?
Davidson	0.01	0.97	1.43	0.08	0.81%	0.95	
Milner	0.03	1.13	2.87	0.11	1.31%	0.94	
School	0.05	0.98	1.76	0.03	0.77%	0.83	
ESG	0.04	1.04	1.43	0.06	2.40%	0.89	

How it all connects together – Account Activity

See portfolio activity as a whole - or by fund

ticker	purchase date	price/share	# shares	commission	sale date	price/share	# shares	commission	notes
MSFT	15-Mar-04	25.23	200	19.99	22-Feb-12	31.43	100	10.05	100 shares remain
BK	5-Mar-08	45.19	67	12.99	28-Sep-11	18.92	67	10.02	
SPWRA	9-Dec-09	23.27	125	12.99	21-Oct-11	9.21	125	10.02	
SKYW	24-Jan-11	15.33	100	9.99	11-Apr-12	10.60	100	10.02	
DLB	16-Mar-11	49.1	30	9.99	22-Feb-12	39.20	30	10.02	

What we want it to look like

Fund	Action	Date	Stock	Price	Qty	Net	Fund Qty
Milner	Buy	3-Jan	AAPL	\$172.30	40	\$6,892.00	40
Davidson	Buy	4-Feb	NVDA	\$118.40	30	\$3,552.00	30
ESG	Buy	5-Mar	NIO	\$93.11	29	\$2,700.19	29
School	Buy	6-May	SEDG	\$14.78	50	\$739.00	100
Milner	Sell	7-Jun	ASTS	\$4.33	63	\$272.79	37
School	Sell	8-Jul	URI	\$531.65	6	\$3,189.90	14
ESG	Buy	9-Aug	LULU	\$377.80	7	\$2,644.60	107

Demo

www.advancedinvesting.org/wp-admin/

SIF LinkedIn Page

In addition to the website we want to overhaul our LinkedIn page to stay more up to date with our class and projects throughout the year.

- Create post announcing new analysts for 2023 year while including short description of each of the analysts.
- Create post over the course of the year highlighting our quarterly performance/ new strategies.
- Near the end of the year create job posting for new students on LinkedIn to apply to SIF.



About us

The Student Investment Fund provides undergraduate students at the David Eccles School of Business at the University of Utah with hands on investment experience. Students participating in the Fund manage a \$1,100,000 portfolio of exchange-listed equities, ETFs, and money market investments. Students perform both individual and group research projects, learn about various analytical techniques, and make presentations before leading finance practitioners.

SIF students have won recognition at a number of state, national, and international finance competitions.

Google Form for Analysts



Google Form Link:

<https://forms.gle/ByUAqcqMVLqkfkSe8>

Please complete the google survey before Oct 18th

- Name
- Professional Headshot
- Email Address
- Personal Links (LinkedIn, Website, Portfolio)

On October 25th come to class in business professional attire to take an updated class photo.

A screenshot of a Google Form titled "Student Bio's for SIF Website". The form contains the following sections:

- Title:** Student Bio's for SIF Website
- Description:** Responses will be used to update website with current analysts. Section will be provided for any feedback or recommendations on what to include.
- Question 1:** Write your preferred name (First, Last) * (Short answer text)
- Question 2:** Please include a professional headshot of yourself in front of a solid or distraction-free background. * (Add file button, View folder button)
- Question 3:** Please include your preferred email address (Personal, Umail, or Proccessional) * (Short answer text)
- Question 4:** Please include any links you would like to include on the website. Some examples include LinkedIn, personal portfolio, personal website, etc. (Maximum of 2) * (Long answer text)

Conclusion & Action Items

Conclusions:

- This was a great starting point for the website overhaul
- We learned a lot about what will be needed to make this even better
- Developed a vision for what the website could look like
- Have a lot of action items to proceed with in the future

Action Items:

- Access to LinkedIn page to create posts/updates.
- Completion of Google Form by Oct 18th by all students who want to be included on website. Link will be provided in project #2 discussion.
- Come professionally dressed for group photo on Oct 25th
- Plugin access for wordpress
- Access to how fund holdings are stored
- Access to brokerage accounts in order to update positions
- Need permissions to add menus (Better Formatting)