



SCHOOL OF ACCOUNTING AND FINANCE STUDENT INVESTMENT FUND

SIF Team – Winter 2018

Investing in the next generation of global finance and business leaders

Over the next 10 years, the School of Accounting and Finance will leverage our people and the University's strengths. This will align our combined resources and energy towards our mission:

Transforming the professions, world-class research and experiential education

To create exceptional learning opportunities for finance students, the School has established a student managed investment fund to give students real-world investment experience in an academic setting. This fund provides a bridge between the theory of academia and the practical workings of capital markets. Specifically, it will provide students with hands-on-training in equity valuation and portfolio management with guidance from industry experts and with supervision by finance faculty.

“What I see in a lot of them is that they’re finding a real passion in this. I sit in the meetings and they’re really excited about the work that they’re doing, and they’re deciding that this is where they want their career to be, and that’s a great thing to be a part of.”

JOHN GORT (BA ‘93)

Chair, Advisory Board (2014-2017)
Senior VP & CFO, InstarAGF Asset
Management Inc.



professionals go #beyondideas
SCHOOL OF ACCOUNTING AND FINANCE



UNIVERSITY OF
WATERLOO

**150 STUDENTS
HAVE PARTICIPATED
FROM 2012 - 2017**



SIF Team – Fall 2017

ALUMNI PLACEMENTS

Macquarie Group • Boston Consulting Group
Deutsche Bank • Deloitte • CIBC • RBC
TD Securities • BMO • Qatalyst • Onex
OTPP • Goldman Sachs • Scotiabank • CPP

The objective of the student investment fund is to generate long-term growth of the fund's assets. The students invest in a broadly diversified portfolio of Canadian and US equities that may provide capital gains and/or income.

Support the next generation of global finance and business leaders

With additional support:

- » Invest in equities beyond North America to develop an understanding of global markets and international diversification
- » Invest in asset types such as fixed income and alternative assets including infrastructure and real estate, providing students an opportunity to learn about asset allocation and its impact on portfolio performance
- » Create a portfolio that focusses exclusively on small cap equities so that students have an exposure to valuing and selecting younger and less liquid firms

“SIF has provided me with excellent foundational skills in equity analysis and exposure to the finance sector. Faculty members and students alike contributed to a unique learning and mentoring environment, where I felt I was pushed to challenge myself and grow.”

HELLEN XIA
BIOTECH/CPA, SIF Senior Analyst

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