

**Breaking News!!!** The Student Investment Fund at Sacramento State University placed second in the 2022 Global Asset Management Education Forum Global Portfolio Competition. For the 2022 competition we were forced into the graduate category because we had 11 MBA students and 10 undergraduate students throughout the competition year...and we still placed second! This is no small feat as we placed highly among top business schools from around the world: [HTML](#).

## Global Portfolio Competition

It is with great pleasure we announce the winners of the GAME Forum 2022 global portfolio competition:

### Graduate Overall

- 1st Place - Northeastern University, 360 Huntington Fund
- 2nd Place - California State University, Sacramento, Student Investment Fund
- 3rd Place - Rice University, M.A Wright Fund

Be a part of the award winning process!

## Elective credit

FIN160/MBA299A - Student Investment Fund Management is offered this upcoming *Spring 2023* semester. This 3-credit hour course counts towards your elective requirements in all Finance Tracks (General Finance, Risk Management, Real Estate, and Financial Planning) and as an elective in the MBA program<sup>1</sup>. Non-finance business majors and business minors are also encouraged to be a part of SIF. Investment analysis is unquestionably interdisciplinary!

## To sign up

First, check the dates for registration windows on the university's website: [HTML](#). Next follow the appropriate instructions below:

**Undergraduate students:** You can register for FIN160 like you do for any other class if you took FIN135 and earned a B- or better.

**Undergraduate currently in FIN135** Follow these steps earned an A- or better in FIN101:

1. Complete the "Request for Concurrent Enrollment" form: [DOC](#). Add anything you wish to the justification section such as relevant work experience or personal investing experience. If you graduate this semester note that as well.
2. Sign the form and either scan/email to Finance Dept. Chair Hao Lin (linh@csus.edu) and cc me or take it directly to Dr. Hao Lin's Office (TAH 2119).
3. Once you secure Dr. Hao Lin's completion of the "Department Chair" section take the form to the Academic Programs Office (TAH-2028).

<sup>1</sup>Although the school website shows FIN160 under the General Finance Track only, the Finance, Insurance, and Real Estate Department approved FIN160 as a substitute elective course for all tracks.

**MBA students:** Pre-requisite is MBA220. See instructions on page 3.

### Undergraduate and MBA students otherwise ineligible:

Contact Dr. Moore and indicate interest in joining the forthcoming SIF *Student Club*.

Please include Dr. Moore (djmphd@csus.edu) on email correspondence.

## Course information

In the course we walk through the full spectrum of fund management: compliance, accounting, performance measurement, security analysis, portfolio formation, and reporting. Employers across California and the nation are well aware of the experience students gain in Student Investment Fund (SIF) programs. SIF experience bolsters a resume and will definitely come up during job interviews. In addition, we routinely host guest speakers including the Chief Investment Officer from CalSTRS and several alumni in exciting careers (BlackRock, CalPERS, CalSTRS, professional traders, local wealth management firms, etc.). These guests share their journey in the profession, provide tips to aid in your job search, and can become valuable contacts as you emerge from Sacramento State.

Not all universities offer a Student Investment Fund program - but we do (#StingersUp #HornetsSwarm)! Furthermore, not all universities have a Bloomberg Terminal - and we have 12. The SIF portfolio started with \$250,000 in 2010 and is currently \$870,000+. That's right, roughly one million dollars. If I were a student, I would certainly like to add something like "Member of a team managing a \$1,000,000 portfolio for the university" on my resume. I highly encourage you consider enrolling in FIN160/MBA299A to build on your finance knowledge and make yourself more competitive in today's job market.

## For more details

I put together several items for your review:

- Fall 2022 Syllabus: [PDF](#). Note: the *Spring 2023* format will be Hybrid meeting Mondays 3:00-4:15 PM in-person and Wednesdays either in-person 3:00-4:15 PM or online asynchronously depending on progress towards proficiency.
- SIF Program Implementation at Sacramento State: [PPTX](#).
- Sample Semester Wrap-up presentation: [PPTX](#).
- Growing list of SIF alumni and where they are now: [HTML](#).

If you have any questions about the *Spring 2023* offering of FIN160/MBA299A Student Investment Fund Management, contact Dr. Moore (djmphd@csus.edu). Hope to see you in class,

-Dr. Moore

## Quotes from prior semester SIF students

"I still keep the things you taught me in mind and actually will refer to it when talking to investment officers at CalSTRS."

- 2022 SIF Student

"thank you for your lessons and for being an inclusive professor. I left very comfortable at the SIF. You were the best professor I ever had!"

- 2021-2022 SIF Student / participant

"Thank you Dr. Moore for walking us through the RIVER process and teaching us how to use the [Bloomberg] Terminal. I learned much in this class and will continue to apply all that I have learned"

-2021 SIF Student

Thank you "for giving students, including myself, the opportunity to take the Student Investment Fund course. It was very helpful and informational by providing hands on experience in portfolio management. I do not have any career background in Finance and therefore, I benefited greatly from the experience. I look forward to using your RIVER process and applying it to my own personal portfolio."

-2021 SIF Student

"Thank you for all your patience and wisdom this semester. I learned more from You than my other classes."

-2020 SIF Student

"I would like to thank you for this semester in the SIF. You taught us how to properly run a portfolio and it became more of a team of all sectors having the same goal... You pushed us to learn aspects of portfolio management that I was not comfortable with at the time. In retrospect, I believe I have gained more knowledge from this class over any other financial course I have taken here at Sac State.... Now I know how to manage a portfolio, gauge risk, and use smarter investing tools."

-2020 SIF Student

The student investment fund "nurtured my passion for finance" and "helped me develop my quantitative ability and analytical acumen"

-2019 SIF Student

"Your teaching style and interaction with the class made the Student Investment Fund particularly interesting and something I looked forward to each week. Furthermore, your initiative to implement Bloomberg Terminals to the curriculum, and require students to be Bloomberg Market Concepts certified, is something that has proved invaluable to me."

-2017 SIF Student

"I had an extremely enriching experience during my time as a part of the SIF when it was under your leadership,

and even recommended my friends to join."

-2017 SIF Student

SIF "was an open space to share knowledge and ideas, and to help refine investment theses... Dr. Moore would go out of his way to connect students with real world opportunities. I got my first career job from an employer coming to the SIF, and I came back to speak to the SIF in 2019 about my experience in the investment management field."

-2013 SIF Student

## SIF Signup Instructions for MBA Students Only

If you are an MBA student interested in participating in the SIF for the *Spring 2023* semester please complete the following steps by *2022.08.25*.

1. Obtain approval to participate in *Spring 2023* SIF from the Faculty Advisor Dr. David Moore by emailing the following items to him at david.j.moore@csus.edu and copy mps@csus.edu:
  - (a) Completed MBA Special Problems Petition (see instructions for completing the form correctly in item #2 below).
  - (b) A very brief statement as to why you would want to participate in the SIF and how you can contribute to the team.
  - (c) A copy of your unofficial Transcripts. You can obtain your unofficial Sac State transcripts via your MySac-State student center. If you would like to include copies of transcripts from your undergraduate degree the MBA program services team can email them to you. Simply send a request to do so at mps@csus.edu.

Dr. Moore generally approves all requests provided you have completed MBA 220 and you have finance course experience (undergraduate or graduate), a strong math background, or personal investing experience.

2. Complete a "Special Problems Petition" Form (attached and here: [PDF](#)). Please fill out the form completely based on the sections A-F as follows:
  - A. Check the box next to "A (Finance)"
  - B. List the Semester and year that you are enrolling in the SIF (Fall/Spring 202X) and then enter "3" for the unit value.
  - C. For the "description of the assignment/nature of the research project" you can attach the SIF Syllabus ([PDF](#)) as the description.
  - D. Check the box next to "Other (explain)" and type "see attached FIN160/299A syllabus."
  - E. Check the box next to "Letter grade" as it must be a letter grade to be counted towards your MBA degree.
  - F. Enter an electronic signature (typing your name is sufficient and preferred to an official signature) and date

Email the Special Problems Petition form to Dr. Moore david.j.moore@csus.edu and copy mps@csus.edu

3. Upon approval of your participation, Dr. Moore will sign the form and forward a copy to mps@csus.edu
4. MPS will get the Associate Dean for Academic Programs approval and the MBA Program Services or the ADAP Enrollment Specialist will add you to the MBA 299A course. Keep in mind that this course must be added manually.