



## Analyst Program Spring 2023 Overview

### Overview

Dating back to 2016, LITG's goal has been to lead a student-run equity portfolio to round out the suite of offerings to its membership. With this portfolio, the need arose for a course to teach to the portion of our students that wished to be involved and the Analyst Program was created to fill this gap. In the Spring of 2021, the updated Analyst Program was written by the Executive Officers (led by SVP Matt Kreimer) to elevate the educational level of the course, and create a more modular, dynamic course with a focus on real-world applications.

The goals of the new program are threefold:

1. Serve as a prerequisite to joining the LITG Investment Team to prove aptitude in financial concepts
2. Show Leeds, the Burrige Center, Donors and Faculty that the students involved are the highest caliber students in the organization
3. Student advancement:
  - a. Teach equity valuation from the bottom-up using industry standard methods
  - b. Prime them for the Leeds Finance and Accounting Curriculum
  - c. Provide an advantage among their peers in the Leeds Community
  - d. Promote experiences that can be leveraged in future job interviews

### Application Process

Applications will open to primarily interested freshman and sophomore students, as well as juniors and 1<sup>st</sup> year MBA students (program will be primarily looking for freshman and sophomore applicants) on January 11<sup>th</sup>. After a student has applied, they will undergo an interview process with the LITG Executive Officers, and will be admitted upon acceptance. Meetings for the program (Tuesdays 4-5PM) are separate from the regular meetings (Wednesdays 5-6PM). All students must be able to attend the Tuesday 4-5pm classes in-person to join the analyst program.

### Units

There are 9 weeks to the course, and units/topics include accounting, financial statement analysis, DCF valuation, comparable companies valuation, financial markets, utilization of data platforms including Bloomberg and S&P CapitalIQ, portfolio management, careers in finance, and other supplemental material by discretion of the instructor. At the end of the course, there will be a capstone stock pitch given by each group.

### LITG Investment Fund

The final goal for the Analyst Program is to provide the students with a solid foundation of financial concepts, valuation methods and accounting so they can make sound recommendations for the LITG Investment Team, which makes the investment decisions for the ~\$350,000 portfolio of equities that has been made available to be actively managed by LITG.