



## LITG Investment Fund One-Pager

### Overview

The LITG Investment Fund (“the Fund”, “the Portfolio”) provides:

1. Members of LITG an opportunity to enhance their skills as a Leeds student and prepare for a career in finance.
2. The Executive Officers of LITG a pathway to actively lead the management of an equities portfolio and provide the membership with real-world investing experience.

By enabling members to be a part of the investment process from start to finish, they will learn skills that supplement their education at Leeds. Specifically, in-depth tracking of current investments and practical knowledge of investment mechanisms, top-to-bottom trade review process, and greater and more meaningful interactions with fellow students, faculty, and advisors. Starting in the Spring of 2021, LITG began managing an equity portfolio of \$350,000 by actively buying and selling equities in collaboration with the Burridge Center for Finance, the Leeds School of Business, and involved donors.

### Investment Philosophy

The Fund aims to pursue risk-adjusted returns that outperform the S&P 500 while preserving capital, observing proper risk management, and performing thorough due diligence on equities placed in the portfolio. Our due diligence process includes evaluating the equity based on the investment criteria outlined in our Investment Mandate by utilizing the methods taught in the LITG Analyst Program.

### Fund Investment Approach/Strategy

To carry out the investment philosophy, the analyst team focuses on risk in its various forms including, but not limited to, business risk, balance sheet analysis, effectiveness of management, threat of obsolescence, valuation risk, focus on companies with robust financials relative to the current market conditions, aggregation risk, and overall focusing on a well-diversified, well-rounded portfolio that reflects good investments.

### Group Structure

- Analysts
  - Research equities and pitch ideas
- Sector Heads
  - Oversee the analysts and provide guidance
- Portfolio Managers
  - Oversees 2-3 sectors, acts as the liaison to the Executive Board
- Executive Board
  - Ensures the overall trajectory of the fund is aligned with LITG’s objectives

### The Analyst Program and Investment Fund Relationship

The Fund is managed by the LITG Investment Team, a group of students overseen by the Executive Board. This group makes the investment decisions with the Advisory Board, and access to the Investment Team is granted based on the completion of the prerequisite LITG Analyst Course