

UTS INVESTMENT
SOCIETY
KNOWLEDGE TO INTELLIGENCE



Annual General Meeting

6PM

Friday 12th March 2010

Room CM05B1.11

Disclaimer

- The information provided in the UTS Investment Society Annual General Meeting has been prepared without taking account of the objectives, financial situation or needs of any particular individual. For this reason, any individual should, before acting on the information in this Annual General Meeting, consider the appropriateness of the information, having regard to the individual's objectives, financial situation and needs and, if necessary, seek appropriate professional advice.

President- Danny Butnaru



What is UTSIS?

Employers today look for more than just an academic qualification. They look for passion, experience and dedication. But the biggest problem for most of us is a lack of practical experience in the field of finance. You may be the brightest student when you leave university but that might not be enough to land you the job that you are after.

This society is aimed at providing you with an edge over others by giving you an opportunity to enhance your practical skills in finance and investments. We aim to provide experience through a student managed fund, a finance magazine and industry seminars. Thus we aim to recreate a finance industry within UTS. We will offer students an ability to undertake long term research and company analysis, make financial recommendations and follow them through to a final investment. We will also be conducting study group sessions for professional courses such as the Chartered Financial Analyst (CFA) Program. We need willing members to fulfill these goals. Everyone is invited to join as all training will be provided.

Who we are: Undergraduate and Postgraduate students committed to real experience beyond what your degree currently offers.

What we plan to do:

1. Student Managed Fund
2. Publish a Financial Magazine with articles written by students
3. Industry Seminars
4. Study group for professional exams such as the CFA Program

Who can join:

Anyone with interest in finance, investments, marketing, accounting or journalism and a willingness to learn and ready to take responsibility.



- President: Danny Butnaru
- Internal Vice President: Shihara Zafrullah
- External Vice President: Ravi Vadali
- Chief Investment Officer: Hashan Jayewardene
- Marketing and Social Executive: Vanessa-Lee Brett
- Treasurer: Russell Ball
- Secretary: Alice Zheng

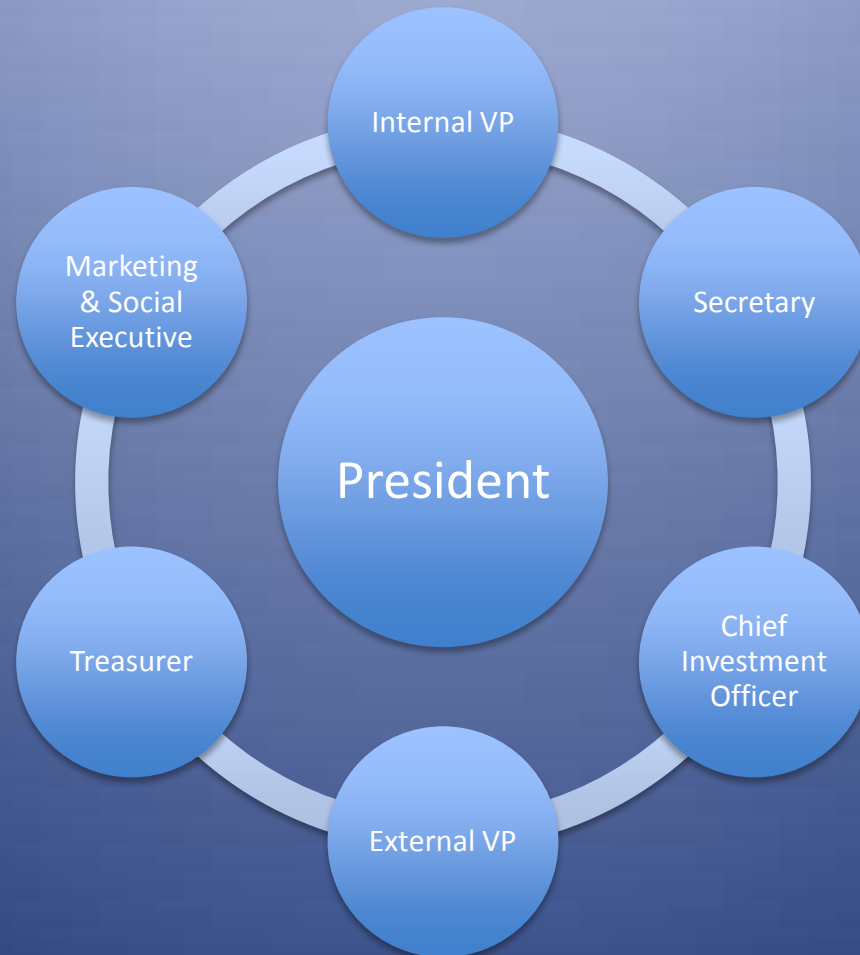
2010 Executive Committee

What do I do?

- PRESIDENT
- • Organise, plan and lead to ensure overall success of the society and set society objectives.
- • Work closely with executive committee to implement membership drive, new membership reception and other new member recognition events.
- • Work closely with executive committee to plan activities for the upcoming year.
- • Hold regular meetings with executive committee members as well as general members.
- • Plan at least 3 industry seminar activities per semester.
- • Actively plan and implement activities on and off campus that focus on social interaction, member engagement and career focused development initiatives.
- • Complete reporting when required.
- • Facilitate a smooth leadership succession and oversee effective transition of responsibilities.
- • Delegate responsibilities where applicable.
- • Implement an effective leadership transition program and offer guidance to the newly elected president as immediate past president for a minimum of 1 month.

UTSIS STRUCTURE

Reporting Methodology



Reporting Process

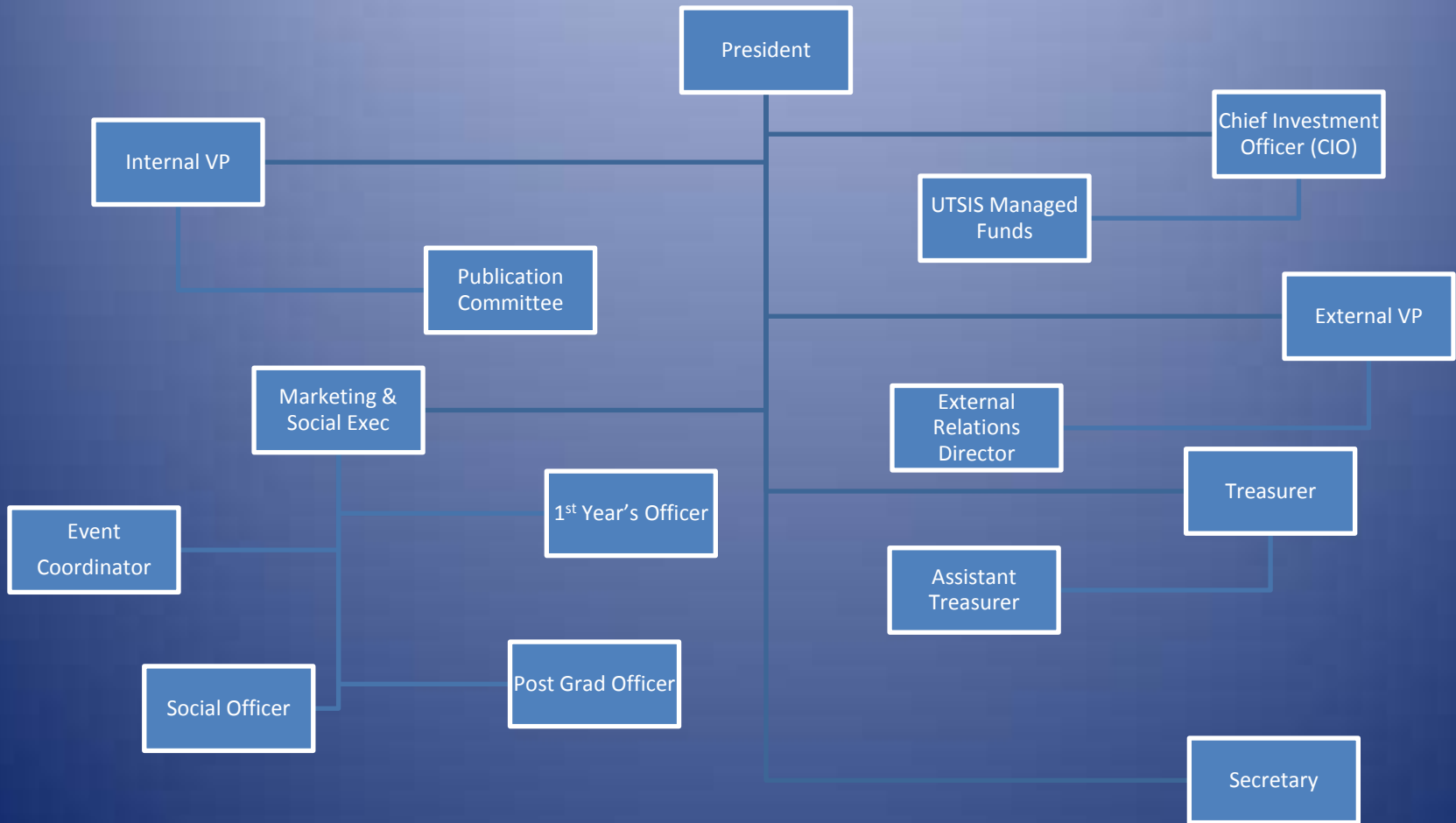
Events, activities, and competitions.

General Executive Meeting

University Records



Organisation Hierarchy



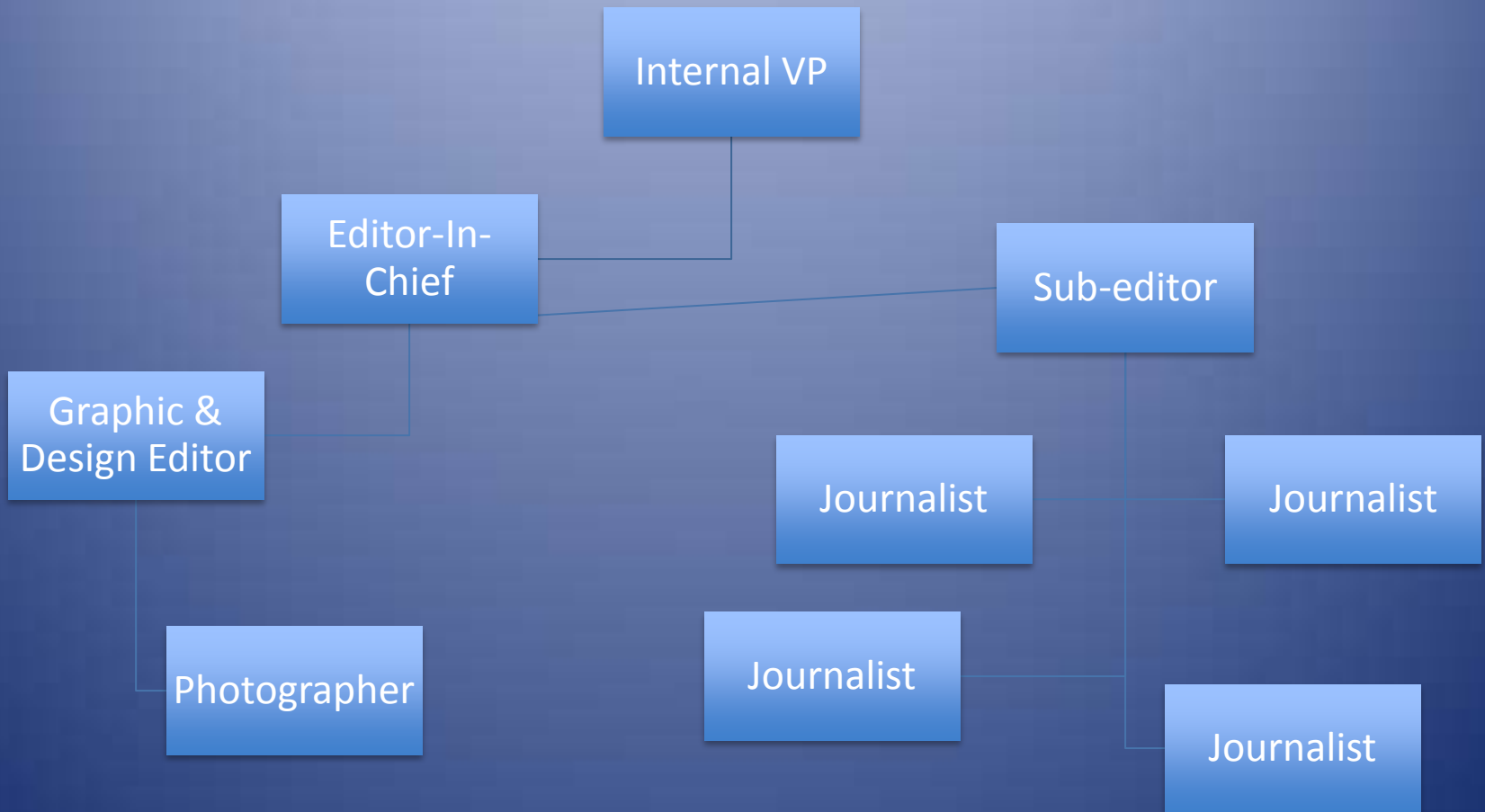


Publication Committee

Publication Committee



Publication Committee Structure





2009- The Year in Brief

UTSIS Managed Funds

- Main activity
- Learning vehicle
- Professional Development
- Designed with industry and faculty

Industry Seminar Series

- Key event
- 3 per semester
- Private equity, investment banking, management consulting, fund management
- Top-tier firms



UTSIS Affiliations

FINSIA Affiliation

- Top membership body for financial services professionals.
- Wealth management, banking & finance and debt capital markets.
- FINSIA Nights
 - Career insight

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FINSIA YFP

- Networking forum
- Selective
- Career development





Vision for 2010

Remaining in 2010

- Industry Seminar Series
- UTSIS Managed Funds
- CFA Nights
- UTSIS Finance Bulletin

New in 2010

- Trading Workshops
- UTSIS Trading Competition
- UNIT Affiliation
- Better Social Events on Campus
- Corporate Sponsorship



Goldman Sachs
J.B. Were

CREDIT SUISSE



BNP PARIBAS

A Passion to Perform.
Deutsche Bank

UBS

J.P. Morgan

Morgan Stanley





Industry Seminar Series



IBs not yet in Australia



WELLS
FARGO

The Wells Fargo logo consists of the words "WELLS" and "FARGO" stacked vertically in a yellow, serif font, centered within a solid red square.

NOMURA

The Nomura logo consists of the word "NOMURA" in a bold, black, sans-serif font, centered within a white rectangular box.



Trading Workshops

Trading Workshops

- Introductory
- Equities
- Frequently check your emails for more information
- Note:
 - in no way intended to be used for trading real capital



UTSIS Managed Funds

UTSIS Managed Funds

- Professional training
- Competencies in trading, analysis and reporting
- Long term goal:

UTSIS Managed Funds

- Faculty and industry supported initiative
- Professional training
- Competencies in trading, analysis and reporting
- Long term goal:
 - “to trade real capital and donate the proceeds to well known charitable organizations (like Youth Off the Streets, National Breast Cancer Foundation, Children’s Cancer Council).”

More than just riding the stock market





Competitions

Competitions

- National competitions (like Trading Places, UBS and the Westpac Comp) will be announced at next week's Plenum Meeting
- UTSIS Trading Competition
 - In house comp only open to members
 - Prizes
 - More information will be provided via email
- Note:
 - Winners of O Day Stock Picking Competition will be formally announced at conclusion of AGM

UNIT Affiliation

- Provides regional outlet to USYD, Mac and UNSW students
- Build skills in public speaking, networking and leadership
- Many more activities



Social Events

Social Events on Campus

- Range of Events
- Social Events
- Parties
- Upcoming Event:
 - Meet & Greet @ The Loft; 8:30PM Start-
Wednesday 17th March 2010

Corporate Sponsorship

- Top-tier & Mid-tier
- Future Growth and Longevity
- Strategic Focus
 - Post Grad & Penultimate Year Students
- Regional Career Networking
 - SocMeet
 - More



CFA Workshops

CFA Nights

- Preparation for the CFA Level 1 Exams
- Engage in relevant discussion of key concepts
- Get your questions answered

CFA Nights

- Preparation for the CFA Level 1 Exams
- Engage in relevant discussion of key concepts
- Get your questions answered



Events for 2010



How do I find out about all the events?

- Email
- UTSIS Website
- Union What's On Magazine
- Union website
- Facebook

The Facebook logo, consisting of the word "facebook" in a white, lowercase, sans-serif font, centered within a dark blue rectangular background.

Chief Investment Officer- Hashan Jayewardene





UTSIS *ManagedFunds*

2009 Overview

Growth Fund

- ❖ *Student managed fund activities from 2008 reviewed, restructured & re-branded: “ UTSIS ManagedFunds ”*
- ❖ *Succession Plan implemented.*
- ❖ *Emphasis on a flexible but professional management structure to replicate the beneficial aspects of ‘real world’ funds management.*
- ❖ *Focus on training & development of key staff to prepare teams for analysis tasks instead of trading immediately.*



UTSIS *Managed Funds*

2010 Overview *Growth Fund*

- ❖ *Continue to focus on better recruitment policies and training practices.*
- ❖ *Improve reporting and management structure.*
- ❖ *Key priority is finalization of Valuation Course Training Modules.*
- ❖ *Greater networking to recruit professional mentors.*
- ❖ *Sense of urgency to streamline and focus on operational areas of the Growth Fund.*

UTSIS *ManagedFunds*: *Activities & Promotions*

- **Prize Winners:**
Union O'Day: Stock Picking Competition Winners
FINSIA Young Finance Professionals event: free ticket offer winner
- **NEW!** Trading/Investing game- stay tuned for details!
- **UTSIS *ManagedFunds*** Recruitment Session- April (date tba)
- Inquiries: Chief Investment Officer - Hashan Jayewardene
hashanjutsis@gmail.com or **www.utsis.org**

Internal Vice President- Shihara Zafrullah



WHAT DO I DO?



WHAT DO I DO?

- Report to executives on progress of the UTS Finance Bulletin
- Networking to achieve targeted goals
- Assisting the president in completing his/her duties
- Assisting in the promotion of UTSIS on and off campus.

GOALS

- Expand membership
- Secure UTSIS office space for this year and future years.

Expand membership

- **Aim:**

Expand membership with students from cross faculties and with differing levels of experience in investments.

Expand membership

- **Course of action:**

UTSIS recruitment stalls around campus.

GOALS

- Expand membership
- Secure UTSIS office space for this year and future years.

UTSIS office space

- **Aim:**

**Successfully secure UTSIS office space
for this year and future years.**

UTSIS office space

- **Progress:**

**Currently liaising with Business faculty
in order secure an office space.**

UTSIS office space

- **Progress:**

Dr. David O'toole (Lecturer, School of Finance and Economics) has agreed to support our cause.

Investment Society's contribution towards university life

- Seminars
- Virtual trading experience
- Completions

External Vice President- Ravi Vadali



2010



UNIVERSITY OF
TECHNOLOGY SYDNEY

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Industry Seminars

Mergers and Acquisitions – JP Morgan Chase

Equity Sales and Trading – JP Morgan Chase

FX Trading – Mizuho Corporate Bank

Corporate Restructuring – Goldman Sachs

Consultancy – Bain and Co

Funds Management

SPONSORSHIPS

UTSIS is aiming for 6 to 7 financial sponsors of UTSIS

5-6 non financial sponsors

Investment Banking and Trading Competitions

JP Morgan 'Trading Places' Portfolio Competition

- If you seek reward, recognition and a real-life stock market trading experience play the J.P. Morgan Portfolio Competition. Starts 22nd of March. Registrations are now Open

UBS Investment Banking Challenge

-The UBS Challenge provides students with the opportunity to complete a case study developed by UBS and construct a 15 minute presentation addressing the relevant issues, as well as answering 5-10 minutes of questions typical to those posed to junior analysts in investment banking

KPMG Business Advisory Competition

Questions?

