

UTS INVESTMENT
SOCIETY



Annual General Meeting
Tuesday March 3rd, 2009



Agenda

- Keynote: Richard Brandweiner (Perpetual)
- 2008 Year in Review: Piyush Jain
- Outlook for 2009: Mark Evans
- SMF Update: Hashan Jayewardene
- Magazine Update: Danny Butnaru
- Questions?

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2008 Review

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Membership Issue



Membership

- Valid during full calendar year (Jan – Dec)
- Founding members from Spring '08 semester are entitled to full membership for the 09 year.
 - Renewal in 2010
- Non-members can purchase membership at conclusion of meeting



What's NEW in 2009?

- New executive committee
- Letter of service
- New activities
- New activities schedule
- New online presence



2009 Executive Committee

- President: Mark Evans
- Internal Vice President: Danny Butnaru
- External Vice President: Nandini Meka
- Treasurer: Russell Ball
- CIO: Hashan Jayewardene
- Marketing: Oliver Emery
- Secretary: Michael Morris

Letter Of Service



December 8, 2004

Mr. David Keller
Director of Human Resources
Human Resources Department
Financial Bank of New York
77 Water Street
New York, NY 10020

Dear Mr. Keller:

After many years of working directly with people in diverse professional settings, I am seeking to leverage my experience in a customer service position within the field of banking at the branch level. For this reason, I was excited to learn that your branch is currently seeking a customer service representative, and would very much like to be considered as a strong candidate.

Ideally, this position will allow me the opportunity to utilize my experience gained as an assistant manager with Coffee Table Books. In this capacity, I co-managed this flagship store in all areas of customer relations, sales generation and reporting, banking, workflow management, staff training and supervision, and problem resolution. Additional experience includes working in restaurant management and, currently, as an independent sales and marketing coordinator for artists, authors, and small business owners. In this position, I have succeeded in positioning my clients for career growth through coordination of unique public relations opportunities.

Much of my experience is transferable, specifically in the areas of sales and customer service support; however, I look forward to learning broad areas of relationship banking, cross-selling of banking products and services, and banking principals. Given the opportunity, I am confident that my experience and personable disposition would be an asset to your branch.

Sincerely,

Joyce Barnes
UTSIS

Joyce Barnes
UTS - School of Finance

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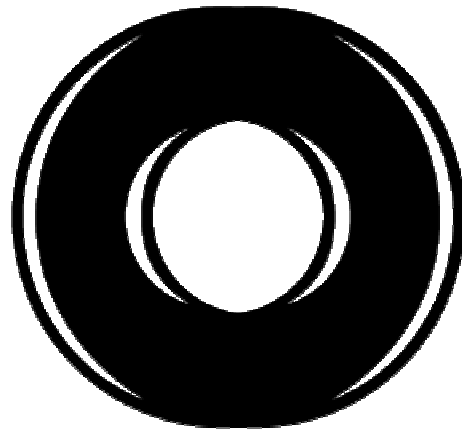


NEW for 2009

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Confirmed Industry Speakers



MACQUARIE
BANK



UBS



Merrill Lynch

Westpac

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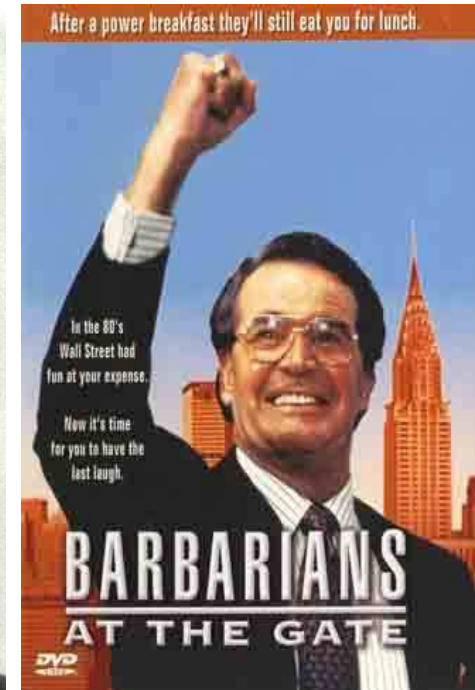
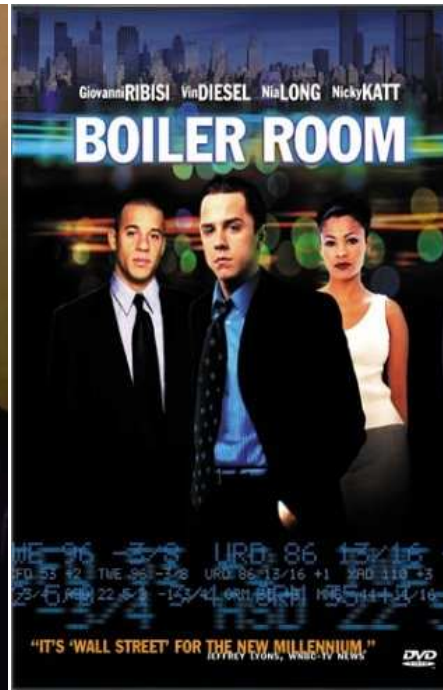


Educational Seminars





Movie Nights



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Excursions



BID	OFFER	LAST	VOL	STOCK
5.01	5.02	5.01	141	MAC COMM
8.00	8.02	8.02	8HT	MACAIRPORT
3.14	3.15	3.13	2HT	MACAR COAL
1.72	1.725	1.725	3HT	MACQ CNTRY
5.86	5.90	5.86	72T	MACQ DDR
16.83	16.84	16.83	6HT	MACQ GOOD
4.15	4.16	4.16	6HT	MACQ INFRA
3.18	3.19	3.18	12M	MACQ OFFIC
2.12	2.13	2.12	2HT	MACQ PRP
8.16	8.18	8.17	3HT	

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CFA Focus Groups





Intervarsity Competitions

- CA Student Challenge
- UBS (Mock Trading Game)
- + More TBC





New Activities Schedule

- Weekly basis
- Alternating days
- March Programme:
 - Tuesday March 10th: Movie Night – Wall St
 - Wednesday March 18th: Industry Seminar – Private Equity
 - Monday March 23rd: CFA Focus Group
 - Week of March 30th: Educational Seminar - Valuation

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Online Presence

The screenshot shows the homepage of the UTS Investment Society website. The header features the UTS Investment Society logo and the tagline "KNOWLEDGE TO INTELLIGENCE" next to a globe graphic with radiating lines. A navigation menu includes links for HOME, ABOUT, THE SOCIETY, RESOURCES, PARTN, and CONTACT. Below the navigation, there are four small images showing people in professional settings. A section titled "New Website - 2009" contains a paragraph of text and a photo of two men in suits. To the right, there is a "Subscribe via RSS" link and a calendar for the month of April.

The screenshot shows the Facebook page for the UTS Investment Society. The page header includes the Facebook logo and a sign-up prompt. The main content area displays the group's name, "About" section, "Basic Info" (including type, description, and contact information), "Members" (showing a list of members with profile pictures), and "The Wall" (showing a post from February 2009). The right sidebar contains the group's profile picture, cover photo, "Officers" list, "Group type", "Admins", and "Related groups".

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KNOWLEDGE TO **INTELLIGENCE**



UTSIS *ManagedFunds*

2009 Programme

UTSIS *Managed Funds*

1. Establishment Phase
2. Strategy/Product Construction
3. Focus on Design, Recruitment & Education
4. Strategy Testing & Refinement: Continuous Improvement through R&D
5. Family of Funds
6. Ultimate Objective: Public Subscriptions

BENEFITS

Education- Investment Management Programme

- Structured Training- Systematic Education & regular feedback.
- Available to Fund staff and potential candidates.
- Safe and stimulating learning environment
- Quarantined from market pressures and competitive tensions until you are prepared to go live.
- Behavioural Finance- Develop Self-Knowledge & study market participants.
- Opportunity to test your ideas & 'market lore' against sophisticated competitors.
- Benefit from the expertise of our Industry Partners & the UTS Community.

Network- Engage with industry & the world

- Build networks & enjoy new experiences.
- Social and professional: make new friends and contacts, locally & globally.

Career Progression

- Excellent experience for your CV- *acquire an edge that employers value.*
- Our Marketing & HR teams will ensure that our members & graduates are visible in the market place.



UTSIS *ManagedFunds*

You WILL Have Fun!

...and get to meet some
interesting characters...

Helicopter Ben

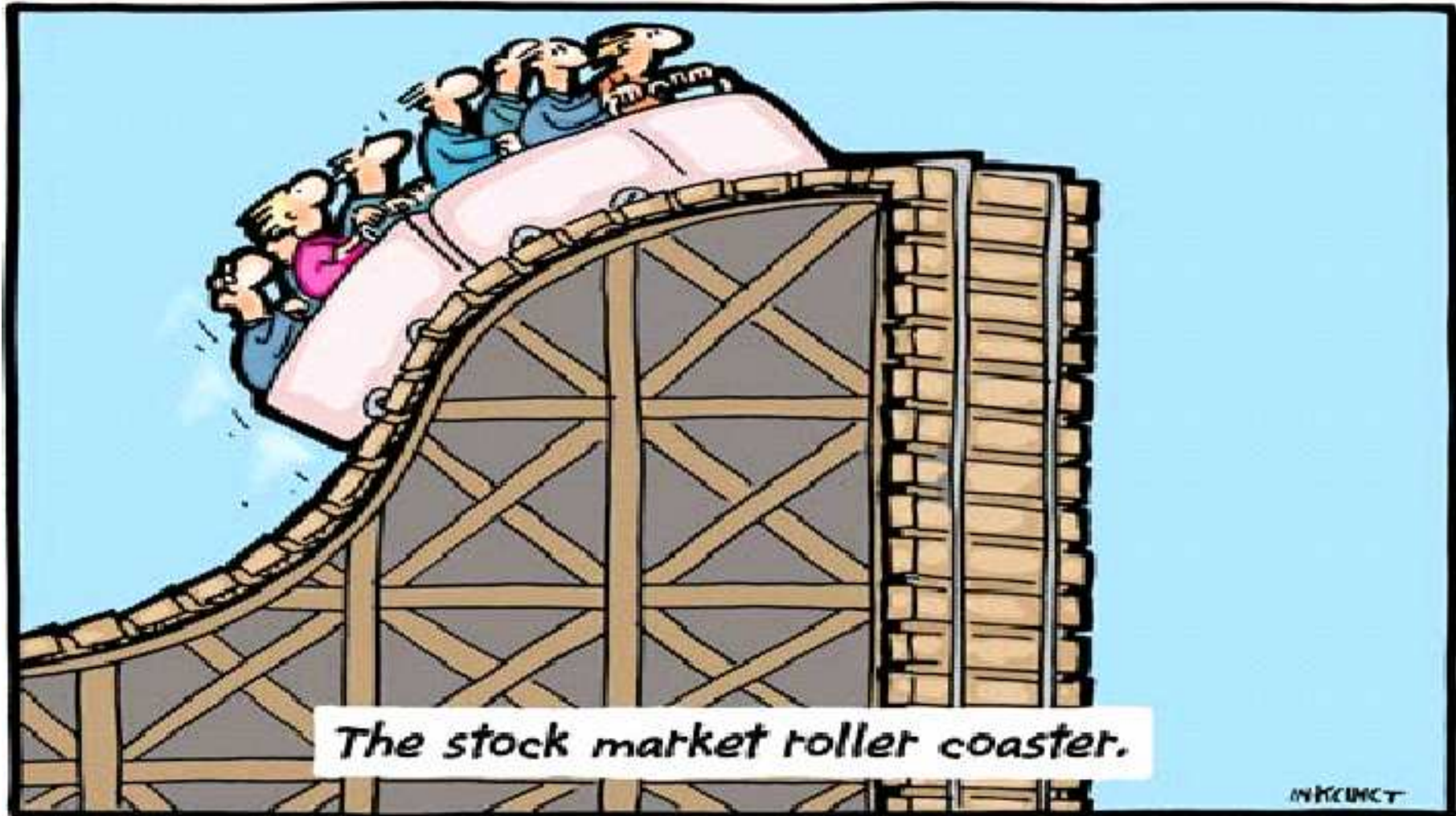


Ben Bernanke Action Figure!!

***Now YOU can drop
money out of a
helicopter!!***

Warning: cannot really prevent a severe recession

Thrill Seekers?

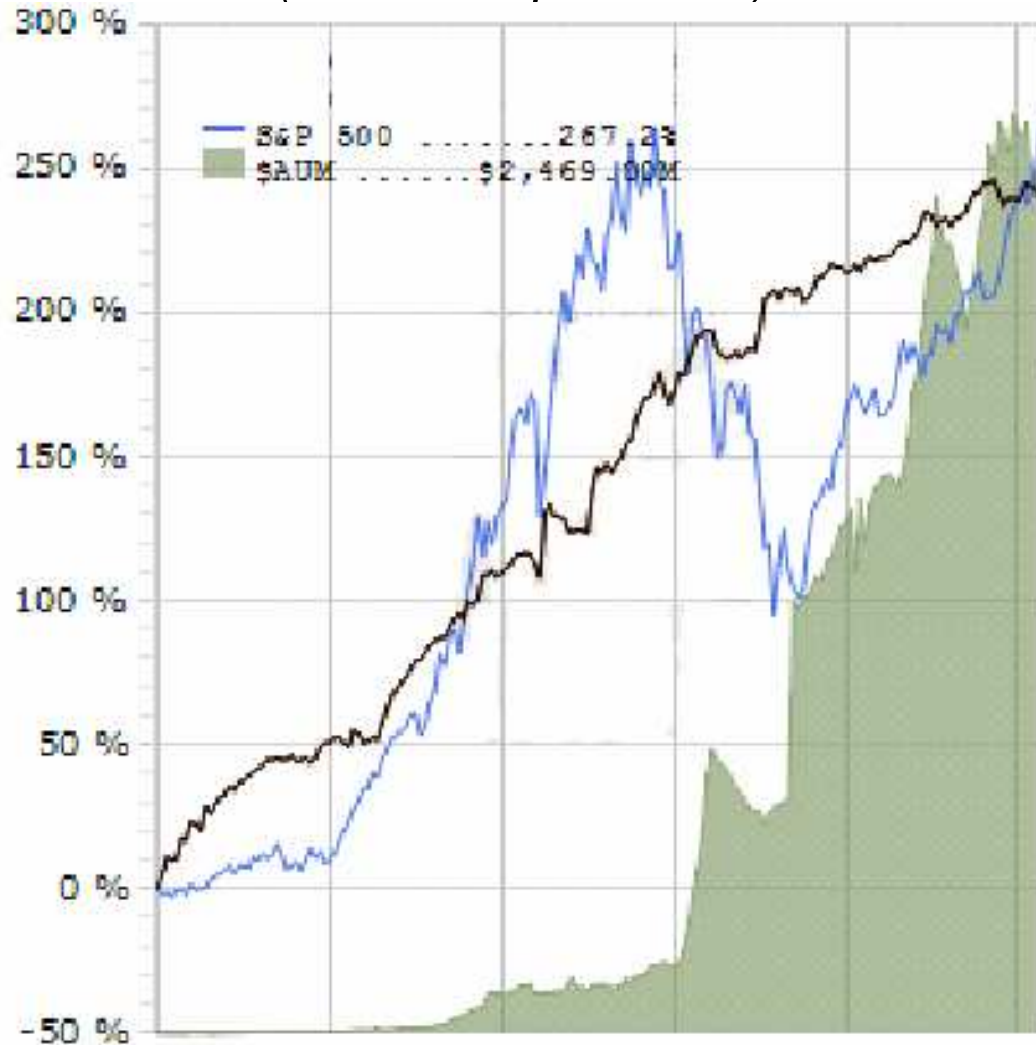


Flo Rida

Black or Blue?

Always Bet on Black!

(smooth & profitable)



Interested? Take the Initiative!

Positions Available:

- *Sector Heads (Eg. Industrials, Financials, Property, Bonds etc)*
- *Financial/Fundamental Analysts*
- *Audit*
- *Treasury*
- *Trading Desk*
- *Quantitative/Statistical/Technical Analysts*

Essentials:

- *Skill/Ability*
- *Time Commitment*
- *Enthusiasm & Dedication*

Applications or Inquiries To:

Chief Investment Officer- Hashan Jayewardene
Hashan.J@utsis.org

UTSIS ManagedFunds

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KNOWLEDGE TO **INTELLIGENCE**



UTSIS Magazine
No Bull

UTSIS Publication

- Creative
- Will challenge your thinking
- Social outlet
- Magazine Title: No Bull

No Bull

- **Specifications**
- Distribution: UTS Kuring-gai and city
- Frequency of publication: 1 edition per semester
- Quantity: 4,000
- Magazine Specs:
 - Full colour jacket, black and white contents
- Number of pages: 40

Advantages of a Magazine

- Turn knowledge into intelligence
- Develop industry connections
- Strengthen and improve both the University's and society's reputation on a global level
- Extra-curricular activity
- Promote and foster the self learning experience

Opportunities

- Broadening of journalism skills
- Hands on experience in running a publication
- Exposure to a wide readership base
- Strengthen industry connections

Content

- Feature articles centred around theme (see *theme examples*).
- Regular articles:
 - M & A watch
 - Politics corner
 - Stock picks
 - Opinion ideas:
 - » Psychology versus mathematics
 - » Government bailouts
 - Marketwatch
 - Education (Eg: Valuation Models)
 - History segment
 - Industry Interview (CEO / Fund manager)

Theme:

Seven Deadly Sins of Finance

- Gluttony: Excess consumerism / leverage / CDOs
- Sloth: Bad management decisions, Government bailouts
- Pride: Wall Street materialism – Ferrari's and Bentley's
- Wrath: The anger afflicted on society as a result job losses, government bailouts, dividend axes, plummeting stock markets, and shrinking superannuation funds
- Greed and Lust: Financial markets engineered to perform like an international casino open 24 hours a day
- Envy: Iran banned from buying shares / Why Russia hates the US

**Greed &
The 7 Deadly
Sins of Finance**



Don't Worry

In case that didn't make much sense here's
a trailer....

Starring the US Dollar...

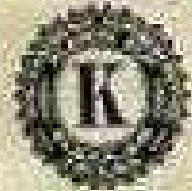


THE UNIT

AMERICA

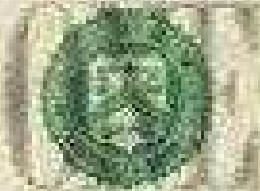
THIS NOTE IS LEGAL TENDER FOR ALL DEBTS, PUBLIC AND PRIVATE

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WASHINGTON, D.C.

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Elizabeth C. Sherman

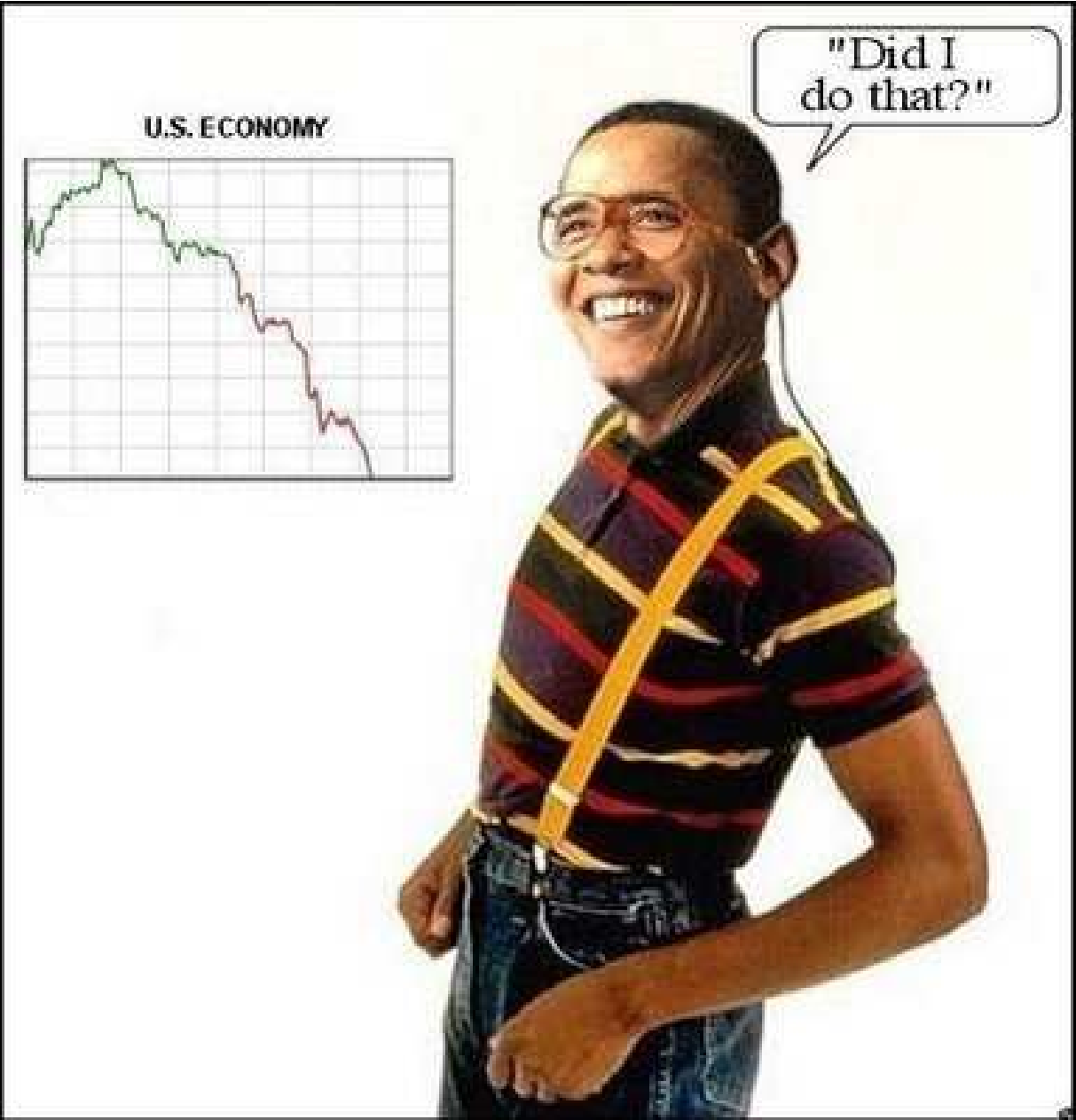
Paul B. Tucker

ONE DOLLAR

Also starring George Bush..



And a new president ...



U.S. ECONOMY

"Did I do that?"



Also starring business leaders..



They star in NO BULL

Coming Soon..

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Questions?