**Who We Are**

**Purpose:**

The Terese Kelly Investment Group is a student run, real money investment fund designed to educate students on the global capital markets, while providing them with real world learning experience in investment management.

**Membership:**

The investment group is comprised of high-performing Master, MBA and Senior undergraduate students who demonstrate academic success and a commitment to a career in financial markets.

**Investments:**

Member's stock pitches and suggested investment strategies are formulated with the analysis of:
- Industry factors
- Revenue growth
- Direct competition comparison
- Debt to equity ratios
- Potential risks
- Key ratios and statistics

**Terese Kelly:**

The fund was started with the generous donation of Terese Kelly who was excited to help create this real world learning program in investment management.

**How We Invest**

**Portfolio Managers and Analysts**

- Each sector we invest in has a respective portfolio manager (PMs). The portfolio manager keeps watch on their sector performance and informs the groups of macroeconomic factors effecting the sector and microeconomic factors effecting each company we are invested in.
- Under each Portfolio Manager is a handful of analysts. The analysts assist in research and pitches, but are not bound to a certain sector.

**Weekly Discussions about the Market**

- Every week, TKIG holds a meeting to discuss the market, our holdings, news, and potential investments. Here, the PMs brief the group about the performance in their sectors. A weekly P&L report (shown on the right) is sent to the group from our Chief Risk Officer.

**Stock Pitches**

- Members make pitches to the group about specific investments. Usually these pitches involve company overviews, in-depth company research, macro and microeconomic factors, technical analysis of the company’s stock and portfolio analysis of how this investment will affect our fund.

**Choosing our Investments**

- Members get inspiration from our weekly meetings, and use School of Management resources (like the Bloomberg Terminal) to research investment ideas. Typically, undergraduates use more fundamental analysis, while graduate students use technical analysis.

**Our Investment Portfolio**

TKIG is composed of an actively managed Trading Portfolio and a passively managed Endowment Fund.

**Our Impact**

During our time in the investment fund we pitched or contributed to the decision of the purchase and selling of the following stocks, which resulted in big returns for the portfolio:

- **Lululemon Athletica (LULU)**
  - Purchased over one year ago at $72.18
  - Sold in December for $69.71
  - **3.8% Return**

- **Deutsche Bank (DB)**
  - Purchased in November at $13.45
  - Sold in February for $19.48
  - **48.5% Return**

- **Discover Financial Services (DFS)**
  - Purchased in October at $56.57
  - Sold in December for $72.47
  - **28.1% Return**